

NEEDS ASSESSMENT REPORT

Work package n°2 - Needs and gap analysis

WP2.2 - Surveying and conducting focus groups

-  Led: IPT
-  Participants: all partners
-  Evaluate digital and sustainability skills needs in the marketing sector. Essential skills for marketing professionals highlighted.
-  Feb to May 2024
-  Report with global survey and focus group results

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1. Introduction

The Needs Assessment Report is a key output of Work Package 2 – Needs and Gap Analysis within the DIGISTAINABILITY project. Its main objective is to identify the digital and sustainability skills that marketing professionals in Europe need to develop in order to adapt to an evolving business environment. This assessment examines the current presence of these skills in Vocational Education and Training (VET) and Higher Education curricula, highlighting gaps and opportunities for improvement.

1.1. Objectives of the Needs Assessment

The digital transformation and the growing relevance of sustainability in business strategies are reshaping the skills required in the marketing sector. However, there is a misperception that marketing is already a fully digitalized field and that sustainability plays a minor role in it. In reality, while digital tools are widely used, their integration into strategic decision-making is still uneven. Likewise, sustainability is increasingly important in corporate strategies, but it is often overlooked in marketing training programs.

The specific objectives of this needs assessment are:

1. To identify the essential digital and sustainability competencies that marketing professionals need to develop in the coming years.
2. To evaluate the presence of these competencies in existing VET and Higher Education curricula.
3. To compare the perspectives of key stakeholders, including students, educators, businesses, and marketing professionals, regarding the importance of these skills.
4. To highlight the gaps between market needs and educational offerings, identifying areas where training programs need to be adapted.
5. To provide a foundation for the development of a competency framework, ensuring that new curricula and training materials align with labor market demands.

1.2. Methodology: Focus Groups and Survey

To achieve these objectives, a mixed-methods approach was applied, combining quantitative and qualitative research techniques.

1. Survey

A large-scale survey was conducted among students, teachers, marketing professionals, and businesses across partner countries. The survey was designed based on the

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GreenComp and DigComp frameworks, ensuring that the competencies assessed align with recognized European standards in sustainability and digital skills.

- The survey was structured in four sections:
 1. General respondent characterization (age, gender, country, occupation).
 2. Specific questions based on occupation, addressing students' learning experiences, teachers' teaching approaches, and industry professionals' skill requirements.
 3. Evaluation of GreenComp competencies, assessing their relevance for marketing education and professional practice.
 4. Evaluation of DigComp competencies, focusing on digital skills essential for the marketing sector.
- The survey was conducted in January and February 2024, distributed in multiple languages, and collected 256 responses from various stakeholders.
- Statistical analysis was performed using PowerBI and SPSS to extract key insights, ensuring data accuracy and validity.

2. Focus Groups

To complement the survey findings, Focus Groups were organized in five European countries (Italy, Spain, Bulgaria, Germany, and Portugal). These sessions provided a deeper understanding of the competencies required in the marketing sector from a qualitative perspective.

- Each focus group consisted of 6 to 10 participants, including students, educators, marketing professionals, and business representatives.
- Discussions were guided by a structured set of 10 predefined questions, covering:
 - The most critical skills for future marketing professionals.
 - The role of sustainability in marketing education and practice.
 - The impact of digitalization on marketing strategies.
 - Strategies for integrating digital and sustainability competencies into education.
- Sessions lasted between 45 to 90 minutes and were moderated by an experienced facilitator, ensuring a balanced discussion.
- Each country provided a detailed summary of the discussions, following a standardized reporting template.

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1.3. Report Structure

This document presents the combined results of both the survey and focus groups, structured as follows:

- **Survey Results:** A quantitative analysis of key digital and sustainability competencies and their perceived importance.
- **Focus Groups Results:** A qualitative discussion of trends, country-specific insights, and skill gaps.
- **Comparative Analysis:** A synthesis of both data sources, highlighting common findings and discrepancies.
- **Conclusions and Recommendations:** Final reflections and proposals for updating marketing education and training.

By integrating both quantitative and qualitative approaches, this report provides a comprehensive and evidence-based overview of the current state of digital and sustainability competencies in the marketing field. These findings will guide the development of new curricula and training materials to ensure marketing professionals are equipped with the skills needed to thrive in a rapidly changing business landscape.

2. Survey

Performing a survey and focus groups with target groups to evaluate marketing sector needs, identify in-demand digital and sustainability skills, and assess their presence in current programs.

2.1. Survey Description

The Survey was conducted in January and February 2024, in English and then translated into the respective language by each of the partners. During the month of March 2024, it was disseminated to the public identified by each partner in December 2023.

The survey is organised into four sections, the first relating to the general characterisation of the respondent, where they are asked about their gender, age, country of residence and current occupation. The second section has specific questions for each respondent by type of occupation. For students, they are asked if they have any experience of internships or Erasmus programmes. Teachers are asked how long they have been teaching courses or subjects in Digital Marketing. People in the labour market are asked about their length of service, the position they hold, the economic area in which they work and the size of their company. Finally, there are two sections that ask about the importance of the competences identified in GreenComp and DigiComp for the marketing sector.

Most of the questions are multi-choice, as it is a long survey, and it was intended to later translate the answers back into English, as it was considered that this would be the most practical way both for those answering and for later on in the analysis phase.

Internationally defined lists were used for the multiple-choice items, namely

- Scientific Fields: <https://www.indeed.com/career-advice/career-development/scientific-fields-of-study>
- Business economy by sector https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Business_economy_by_sector_-_NACE_Rev._2
- International Standard Classification of Occupations (ISCO): <https://www.ilo.org/public/english/bureau/stat/isco/isco88/major.htm>

2.2. Sample characterization

A total of 256 people from the different partner countries answered the questionnaire, and a summary of the group's characterisation can be seen in Table 1.

Table 1 - Characterisation of responses by partners

Partner	Age Average	Students	Employed	Teacher	Answers
Hetel	32	14 (41.2%)	17 (50.0%)	3 (8.8%)	34 (13.3%)
Nazaret Fundazioa	26	35 (72.9%)	5 (10.4%)	8 (16.7%)	48 (18.8%)

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University of Urbino "Carlo Bo"	28	40 (80.0%)	4 (8.0%)	6 (12.0%)	50 (19.5%)
Ilmiofuturo	34	26 (46.4%)	16 (28.6%)	14 (25.0%)	56 (21.9%)
Polytechnic University of Tomar	25	24 (68.6%)	7 (20.0%)	4 (11.4%)	35 (13.7%)
ACEEU	33	3 (50.0%)	2 (33.3%)	1 (16.7%)	6 (2.3%)
Fondatsiya Na Biznesa Za Obrazovani	41	3 (11.1%)	22 (81.5%)	2 (7.4%)	27 (10.5%)
Total	31	145 (56.6%)	73 (28.5%)	38 (14.8%)	256 (100.0%)

The average age is 31, as the majority are students (56.6%). The partners have average ages associated with the current status of the respondent, and we can see that the universities (Polytechnic University of Tomar and University of Urbino "Carlo Bo") have the lowest average ages.

In terms of gender, there is a prevalence of female gender (154, 60.2%). Only 18 (7.0%) people mentioned belonging to a minority group, referring to physical disabilities, being an immigrant or religion.

The distribution by level of education completed indicates that the majority is distributed between VET (85, 33.2%) and Bachelor (71, 27.7%) and Master (62, 24.2%) as shown in figure 1.

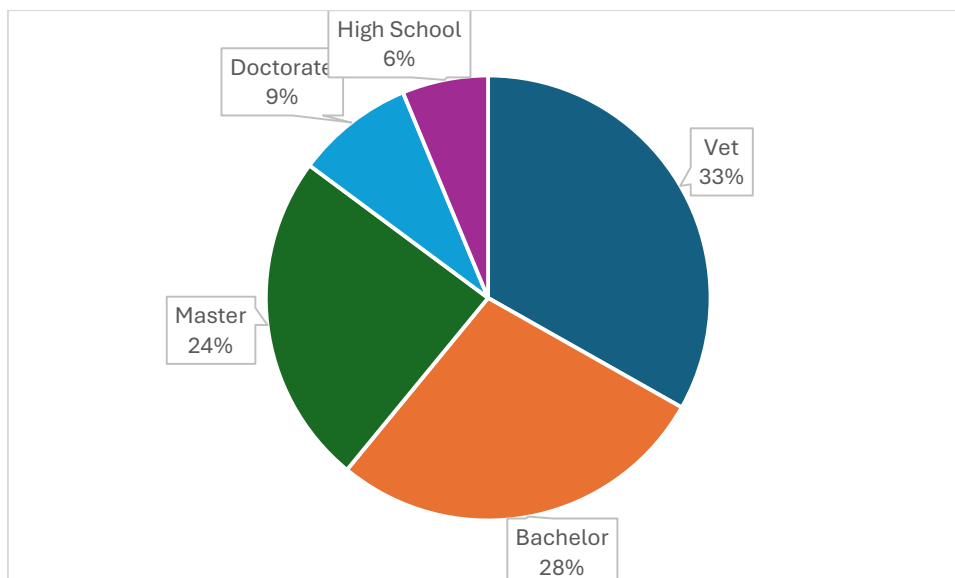


Figure 1 - Distribution by level of education

In terms of occupation, the student option prevails with 145 (56.6%), followed by teachers with 38 (14.8%), with the remaining people already in the labour market being Employer with 30 (11.7%), Job Seeker with 11 (4.3%) and Worker seeking improvement with 32 (12.5%).

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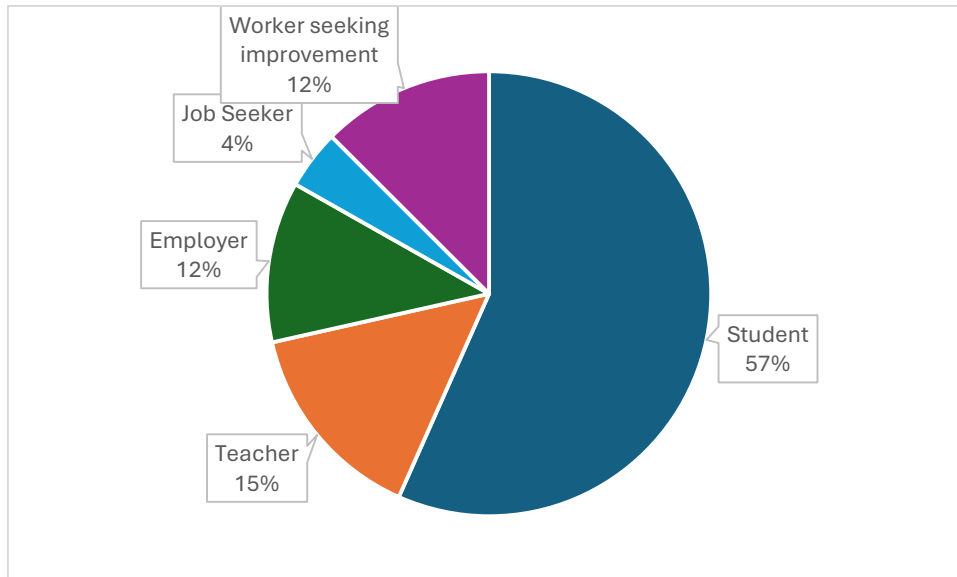


Figure 2 - Distribution by occupation

The scientific area with which they are associated is mainly Social Sciences, with 210 (80.0%) responses. This is understandable given that the aim was to reach people studying or working in marketing, which falls within this scientific area. Some are also linked to engineering and technology, with 36 (14.1%) responses.

Analysing the respondents by type of occupation, we can see that of the total of 145 students, 18 have completed an Erasmus programme (12.4%), and 75 have already completed an internship (51.7%). This means that they have some experience of a real work context, so they can see what skills might be needed, without biasing the results.

The teachers who answered the questionnaire had an average of 19 years' service, with some having been teaching for between one and 35 years. Of the 38 teachers, 24 (63.2%) teach marketing courses or subjects in the area.

Green Comp

Table 2 - Response distribution on the importance of each of the Green Comp competences in the future (%).

GreenComp Areas	Skills	5-Increase	4-Slightly increase	3-Maintain	2-Slightly decrease	1-Decrease	Average
1.1 Valuing sustainability Skills - Importance in the future	Sustainable business insight	43,25%	40,08%	11,11%	3,97%	1,59%	4,19
	Strategic communication	43,25%	41,27%	11,90%	3,57%	0,00%	4,24
	Practical implementation	39,29%	42,86%	14,29%	2,78%	0,79%	4,17
1.2 Supporting fairness Skills - Importance in the future	Integrated Ethical Communication and Engagement	41,67%	39,68%	15,48%	2,78%	0,40%	4,19
	Sustainability Certification and Strategic Application	46,03%	35,32%	15,08%	3,57%	0,00%	4,24
	Diversity, Ethics, and Consumer Advocacy	35,32%	46,03%	15,08%	3,57%	0,00%	4,13
1.3 Promoting nature - Importance in the future	Sustainable Marketing Integration	42,86%	42,86%	10,32%	3,57%	0,40%	4,24
	Circular Economy and Resource Stewardship	46,83%	36,51%	13,89%	2,38%	0,40%	4,27
	Sustainability Communication and Public Education	39,29%	43,25%	12,30%	3,57%	1,59%	4,15
2.1 Systems thinking skills - Importance in the future	Lifecycle and Systems Integration	29,76%	44,44%	20,63%	3,17%	1,98%	3,97
	Holistic and Communication Strategy	27,78%	46,43%	19,84%	5,95%	0,00%	3,96
	Risk Management and Collaborative Insight	33,73%	45,63%	17,46%	1,98%	1,19%	4,09
2.2 Critical thinking skills - Importance in the future	Critical Market Insight	37,70%	47,22%	11,90%	2,38%	0,79%	4,19
	Analytical and Cognitive Proficiency	34,52%	48,41%	14,29%	2,38%	0,40%	4,14
	Consumer Critical Engagement	38,10%	42,06%	15,87%	2,78%	1,19%	4,13

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2.3 Problem framing skills - Importance in the future	Opportunity Recognition and Strategic Integration	36,51%	42,06%	17,46%	2,78%	1,19%	4,10
	Systemic Thinking and Product Innovation	40,08%	43,25%	13,89%	2,38%	0,40%	4,20
	Communication, EQ, and Systemic Application	39,68%	41,27%	15,08%	3,17%	0,79%	4,16
3.1 Futures literacy skills - Importance in the future	Critical and Strategic Foresight	36,51%	43,65%	17,06%	1,59%	1,19%	4,13
	Regulatory Insight and SDG Integration	29,76%	45,24%	20,24%	3,57%	1,19%	3,99
	Consumer Insight and Adaptive Strategy	36,90%	44,84%	13,49%	2,78%	1,98%	4,12
3.2 Adaptability skills - Importance in the future	Strategic and Climate Adaptability	38,10%	41,27%	16,27%	3,17%	1,19%	4,12
	Integrated Sustainable Practices	37,70%	45,63%	13,49%	1,98%	1,19%	4,17
	Proactive Learning and Evaluation	39,29%	43,65%	13,89%	1,98%	1,19%	4,18
3.3 Exploratory thinking skills - Importance in the future	Innovative Sustainability	42,86%	39,29%	14,29%	2,38%	1,19%	4,20
	Material and Consumption Innovation	47,22%	36,11%	11,90%	4,76%	0,00%	4,26
	Consumer-Centric Design	47,62%	34,52%	13,49%	4,37%	0,00%	4,25
4.1 Political agency skills - Importance in the future	Policy Advocacy and Communication	25,40%	45,63%	25,40%	1,98%	1,59%	3,91
	Corporate and Regulatory Integration	28,97%	44,44%	21,03%	4,76%	0,79%	3,96
	Stakeholder and Community Strategy	35,32%	40,08%	21,03%	2,78%	0,79%	4,06
4.2 Collective action skills - Importance in the future	Collaborative Strategies	30,16%	46,03%	19,84%	2,38%	1,59%	4,01
	Leadership and External Synergy	37,30%	44,44%	15,87%	1,98%	0,40%	4,16
	Sustainability Advocacy	38,49%	47,22%	11,11%	1,98%	1,19%	4,20
	Innovative Leadership	39,68%	42,06%	14,29%	3,17%	0,79%	4,17

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4.3 Individual initiative skills - Importance in the future	Sustainability Communication and Engagement	40,87%	43,65%	11,90%	3,17%	0,40%	4,21
	Personal Growth and Action	42,46%	41,67%	14,68%	1,19%	0,00%	4,25

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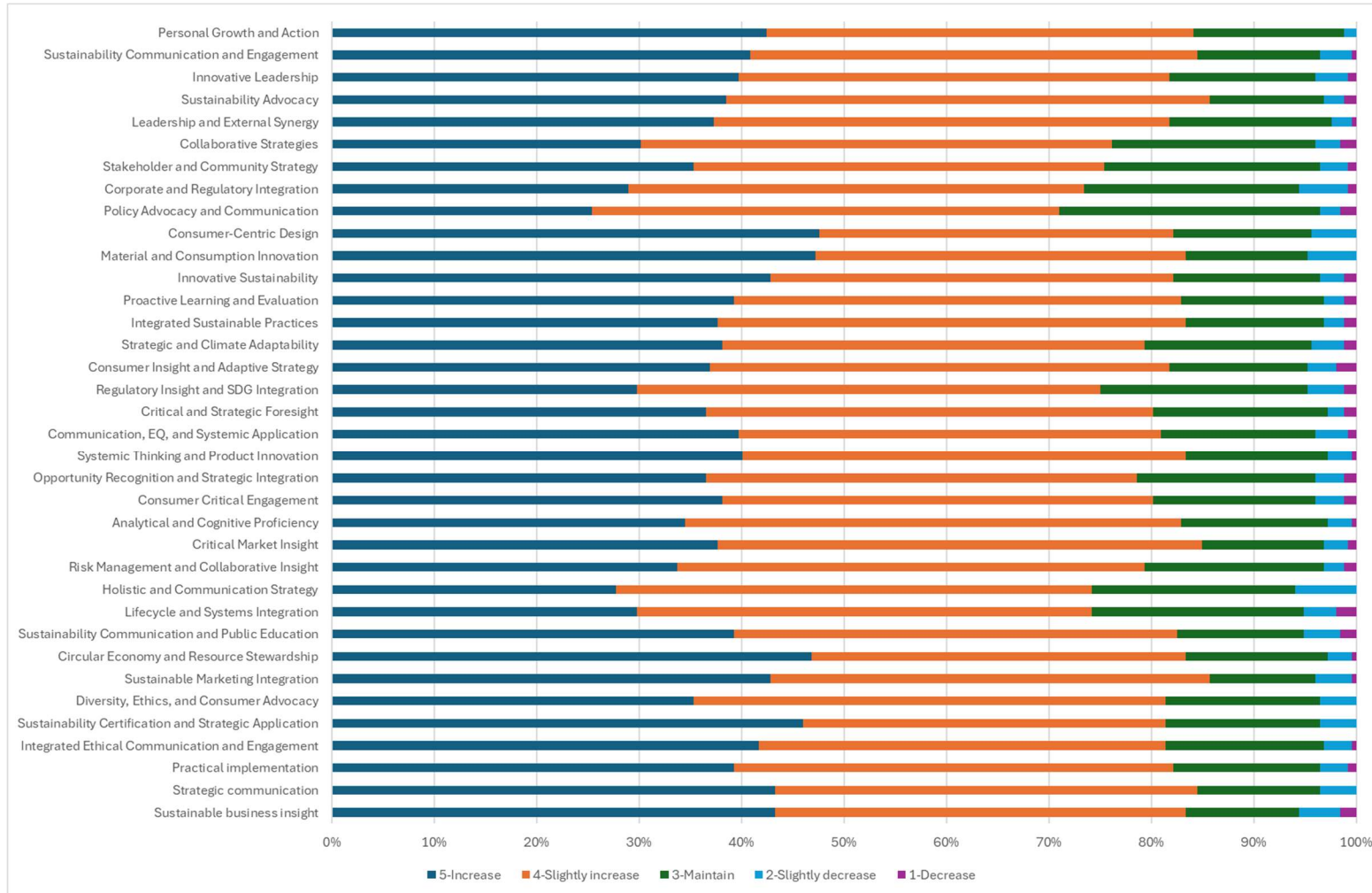


Figure 3 - Response distribution on the importance of each of the Green Comp competences in the future (%)

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2.2.1. Discussion

By analysing tables 2 and 3 and figure 3, we can see that one area stands out from the rest, as the competences have values between 4.26 and 4.20. This is the area of 3.3 Exploratory thinking skills - Importance in the future which includes the competences of Innovative Sustainability, Material and Consumption Innovation and Consumer-Centric Design.

On the other hand, the competence that stands out with the highest average is Circular Economy and Resource Stewardship with 4.27, within the area of 1.3 Promoting nature - Importance in the future.

Table 3 - The 10 competences with the highest average

GreenComp Areas	Skills	Average
1.1 Valuing sustainability Skills - Importance in the future	Strategic communication	4,24
1.2 Supporting fairness Skills - Importance in the future	Sustainability Certification and Strategic Application	4,24
1.3 Promoting nature - Importance in the future	Sustainable Marketing Integration	4,24
	Circular Economy and Resource Stewardship	4,27
2.3 Problem framing skills - Importance in the future	Systemic Thinking and Product Innovation	4,20
3.3 Exploratory thinking skills - Importance in the future	Innovative Sustainability	4,20
	Material and Consumption Innovation	4,26
	Consumer-Centric Design	4,25
4.2 Collective action skills - Importance in the future	Sustainability Advocacy	4,20
4.3 Individual initiative skills - Importance in the future	Sustainability Communication and Engagement	4,21
4.3 Individual initiative skills - Importance in the future	Personal Growth and Action	4,25

Table 3 shows that competences associated with regulations or policies have a lower average, but the value is between 3.91 and 3.91, which shows that they are still important.

Table 4 - The competences with the lowest average

GreenComp Areas	Skills	Average
2.1 Systems thinking skills - Importance in the future	Lifecycle and Systems Integration	3,97
	Holistic and Communication Strategy	3,96
3.1 Futures literacy skills - Importance in the future	Regulatory Insight and SDG Integration	3,99
4.1 Political agency skills - Importance in the future	Policy Advocacy and Communication	3,91
	Corporate and Regulatory Integration	3,96

DigiComp

Table 5 - Response distribution on the importance of each of the DigiComp competences in the future (%).

DigiComp	Skills	5-Extremely important	4-Very important	3-Moderate important	2-Slightly important	1-Not Important	Average
Communication and collaboration -Importance in the future	Interacting through digital technologies	38,9%	45,2%	14,3%	1,2%	0,4%	4,21
	Sharing through digital technologies	40,5%	44,0%	13,9%	1,2%	0,4%	4,23
	Engaging in citizenship through digital technologies	30,2%	41,3%	23,8%	4,8%	0,0%	3,97
	Collaborating through digital technologies	41,3%	40,1%	16,3%	2,0%	0,4%	4,20
	Netiquette	39,3%	34,9%	23,4%	0,8%	1,6%	4,10
	Managing digital identity	40,5%	37,3%	17,9%	4,0%	0,4%	4,13
Digital content creation - Importance in the future	Developing digital content	45,2%	36,9%	14,7%	2,4%	0,8%	4,23
	Integrating and re-elaborating digital content	38,5%	38,9%	17,9%	4,4%	0,4%	4,11
	Copyright and licences	42,9%	38,5%	14,7%	3,2%	0,8%	4,19
	Programming	36,9%	39,3%	18,3%	4,4%	1,2%	4,06
Safety - Importance in the future	Protecting devices	54,4%	29,4%	13,1%	2,4%	0,8%	4,34
	Protecting personal data and privacy	71,0%	20,2%	7,1%	0,8%	0,8%	4,60
	Protecting health and well-being	69,0%	20,2%	9,1%	1,2%	0,4%	4,56
	Protecting the environment	62,3%	26,6%	9,1%	1,2%	0,8%	4,48
Problem solving - Importance in the future	Solving technical problems	26,6%	46,8%	23,0%	3,2%	0,4%	3,96
	Identifying needs and technological responses	38,5%	36,5%	21,0%	3,2%	0,8%	4,09
	Creatively using digital technologies	36,9%	41,3%	19,0%	2,0%	0,8%	4,12

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Identifying digital competence gaps	34,5%	45,2%	17,9%	1,2%	1,2%	4,11
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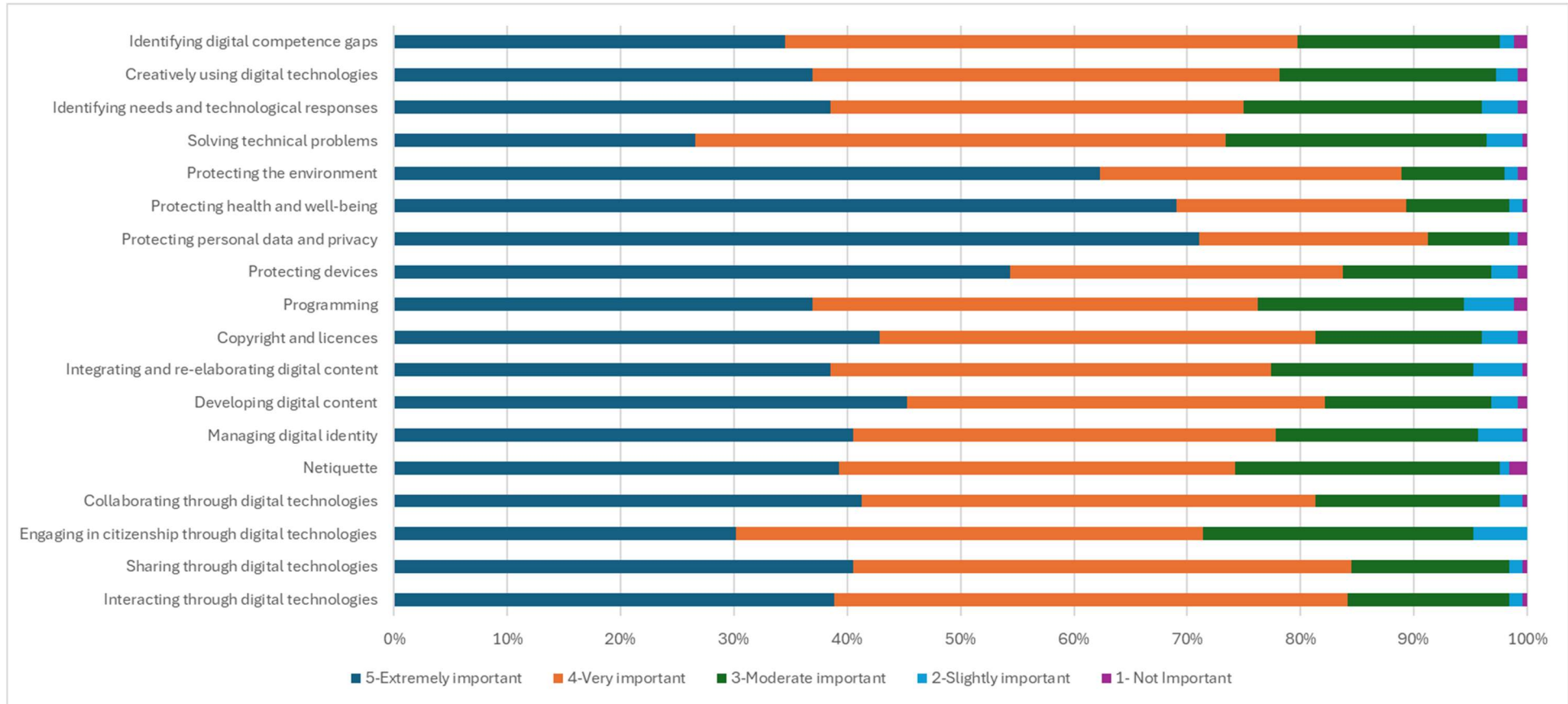


Figure 4 - Response distribution on the importance of each of the DigiComp competences in the future (%).

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2.2.2. Discussion

The competences in Safety - Importance in the future stand out considerably, with more than 50% of respondents considering them to be 5 - Extremely important (Table 5 and 6 and Figure 4), with the following values: Protecting personal data and privacy (71.0%), Protecting health and well-being (69.0%), Protecting the environment (62.3%) and Protecting devices (54.4%).

Table 6 - The competences with the highest average

DigiComp	Skills	Average
Safety - Importance in the future	Protecting devices	4.34
	Protecting personal data and privacy	4.60
	Protecting health and well-being	4.56
	Protecting the environment	4.48

All the competences have an importance level above 3.96 (table 5 and 7), which shows that they are all important and cannot be discarded.

Table 7 - The competences with the lowest average

DigiComp	Skills	Average
Communication and collaboration -Importance in the future	Engaging in citizenship through digital technologies	3.97
Problem solving - Importance in the future	Solving technical problems	3.96

2.3. Conclusions

The GreenComp and DigiComp frameworks highlight the growing importance of sustainability-related and digital skills across various domains. The analysis of the data reveals key trends and competencies that are expected to play a crucial role in the future of businesses and organizations, particularly in digital marketing.

One of the most evident trends is the increasing significance of sustainability and digital competencies. Most of the listed skills received high ratings, with most respondents indicating that their importance will either increase or slightly increase. This reflects a broad acknowledgment of sustainability and digital literacy as core elements of future professional environments.

Competencies such as Sustainable Business Insight, Strategic Communication, and Practical Implementation received some of the highest ratings. These findings suggest that

professionals must develop a deep understanding of sustainability strategies and be able to communicate them effectively within organizations and to external stakeholders.

Skills related to ethical and fair business practices, such as Integrated Ethical Communication and Engagement, Sustainability Certification and Strategic Application, and Diversity, Ethics, and Consumer Advocacy, were also highly rated by the respondents. This indicates that organizations are expected to prioritize ethical considerations and social responsibility when making strategic decisions.

Another key area identified is the emphasis on circular economy principles and sustainable resource management. Competencies like Circular Economy and Resource Stewardship show that businesses and policymakers should focus on efficient resource use and waste reduction as part of broader sustainability efforts.

The findings highlight the importance of Lifecycle and Systems Integration, Risk Management and Collaborative Insight, and Holistic Communication Strategies in addressing complex sustainability challenges. These competencies underline the necessity of understanding interconnected systems and making informed decisions that consider long-term environmental and social impacts.

Sustainability and digital challenges require innovative and flexible solutions. Skills such as Strategic and Climate Adaptability, Innovative Sustainability, and Consumer-Centric Design are increasingly valued by the respondents. These competencies reflect the need for professionals to embrace change, anticipate future trends, and create innovative solutions that align with sustainability and digital goals.

The importance of digital collaboration and communication is highlighted in the DigiComp framework. Skills such as Interacting through Digital Technologies, Sharing through Digital Technologies, and Collaborating through Digital Technologies were highly rated by the respondents, demonstrating the growing need for digital proficiency in professional environments.

Developing and integrating digital content, understanding Copyright and Licenses, and Programming are critical competencies for the future. Additionally, problem-solving skills like Identifying Needs and Technological Responses and Creatively Using Digital Technologies were recognized as key competencies for digital professionals. Protecting personal data, privacy, health, and the environment were among the most highly rated skills, emphasizing the growing concern over digital security. Skills such as Protecting Devices and Protecting Personal Data and Privacy received top scores, indicating that cybersecurity knowledge is essential for digital marketing professionals.

The survey results about the GreenComp and DigiComp competencies emphasize the growing relevance of sustainability and digital competencies across multiple domains. Businesses and organizations will need to prioritize sustainability communication, ethical engagement, systemic thinking, adaptability, digital collaboration, cybersecurity, and policy advocacy to address future environmental, technological, and social challenges. Developing these skills will be crucial for professionals aiming to contribute to a more sustainable and digitally literate world.

3. Focus Groups

The preparation process for the Focus Groups by each partner followed clear guidelines to ensure the assessment of digital and sustainability skills in the marketing sector. Planning included key deadlines, such as the final delivery of materials by February 20, 2024, and the execution of national Focus Groups in April 2024. By May 31, 2024, each partner submitted an English summary of the results, along with a photo of the event.

The purpose of the Focus Groups was to discuss the essential skill needs for marketing professionals. Each session included six to ten participants representing the sector, including students, teachers, professionals, and researchers. The discussion was led by an experienced moderator, ensuring a smooth and inclusive dialogue within a timeframe of 45 to 90 minutes. The questions addressed were pre-defined, up to a maximum of ten.

Participant recruitment ensured diversity in gender, age, scientific area, and educational level. Additionally, all participants were aware that their contributions would be recorded for later analysis and that a group photo would be taken.

The session began with the collection of demographic information and written consent. Next, the moderator gave a brief introduction to the topic and established basic discussion rules, ensuring that everyone participated and that different viewpoints were respected. The questions covered aspects such as essential marketing skills, the relationship between marketing and sustainability, the impact of digitalization, and strategies to improve sustainable skills.

The Focus Groups were preferably conducted in person. If this was not feasible, fully online sessions were organized, avoiding hybrid solutions. The session was led by a moderator and an assistant, the latter responsible for taking notes and operating the recorder. Both acted impartially, ensuring equal participation from all attendees.

After the session, the collected data was analyzed, and each partner prepared a detailed summary of the discussions following a pre-defined template. The final materials delivered included:

- An English summary divided according to the discussed questions;
- A group photo of the participants;
- All signed consent forms.

This process ensured structured and productive discussions, contributing to the identification of gaps and opportunities in the training of marketing professionals aligned with new digital and sustainability requirements.

3.1. Results

After the submission of reports from the different countries, an analysis was conducted to identify common points among the participating nations. This process helped to highlight the key needs and challenges in digital marketing, sustainability, and digital competencies

across regions, offering valuable insights into broader trends and priorities. The focus groups held in Italy, Spain, Bulgaria, Germany, and Portugal revealed both shared concerns and country-specific approaches. Below is a detailed analysis of these needs, along with a comparative discussion on how different countries address these aspects.

Identified Needs in Each Country:

➤ **ITALY**

Marketing Degrees:

- Continuous innovation in marketing skills.
- Integration of digital and sustainability competencies through specialized transversal modules.

Companies:

- Incentivization of corporate strategies that fully incorporate sustainability values and digitalization.
- Support in addressing sustainability issues influenced by consumer interactions.

Education:

- Promotion of sustainability values from early education.
- Potential to cultivate a culture of sustainability in society.

➤ **SPAIN**

Marketing Degrees:

- Incorporation of comprehensive digital and sustainable marketing modules.
- Practical training on the latest digital tools and technologies, particularly data analysis.
- Emphasis on ethics and sustainability in all marketing practices.

Professional Development:

- Ongoing training programs for marketing professionals to keep up with technological advancements.
- Workshops and courses on sustainability and ethical marketing practices.

Companies:

- Integration of sustainability into core values and business operations.
- Employee training and development programs with a strong focus on sustainability.
- Collaboration between educational institutions, businesses, and government bodies to promote best practices in sustainable marketing.

Regulations:

- Advocacy for stringent regulations against greenwashing and transparency in marketing practices.
- Government incentives for companies demonstrating strong commitments to sustainability.

➤ **BULGARIA**

Marketing Degrees:

- Foundational data and analytical skills.
- Expertise in social media management, SEO/SEM.
- Knowledge of AI, automation, and content creation for effective marketing strategies.

Companies:

- Continuous employee training.
- Development of internal sustainability policies.
- Fostering creativity through innovation initiatives.
- Integration of sustainability into core marketing strategies with transparency and honesty.
- Adaptation to evolving regulations.
- Building lasting customer relationships based on shared values.

Regulations:

- Public institutions to provide guidelines and incentives for sustainable business practices.

➤ **GERMANY**

Marketing Degrees:

- Proficiency in social media engagement and data analytics.
- Need for transparency and collaboration to ensure genuine sustainability practices and avoid greenwashing.
- Expertise in sustainability communication.

Companies:

- Debate between sustainability as a luxury for smaller businesses and as a priority from the start.
- Employee education and collaboration with stakeholders.
- Integration of sustainability into company mission and values.

Public and Private Institutions:

- Collaboration with creative agencies.
- Strategic use of digital tools such as AI.
- Emphasis on local products and partnerships as effective strategies.

➤ PORTUGAL

Marketing Degrees:

- Continuous skill innovation.
- Increased contact with professional practice.
- Linking sustainability to different curricular units.
- Courses on sustainability literacy.

Companies:

- Sustainability as a major concern while balancing cost considerations.
- Regular technological updates.
- Commitment to transparency.
- Investment in product research and development.

Public Institutions:

- Encouraging sustainable habits.
- Educating citizens on sustainable consumption.
- Facilitating public and open discussion forums on sustainability.

3.2. Detailed Analysis of the Focus Groups

3.2.1. Marketing Degrees and Professional Training

Italy, Spain, and Portugal emphasize the importance of continuous skill innovation in marketing education. While Italy and Portugal highlight the integration of sustainability into various curricular units, Spain takes a more practical approach by focusing on hands-on training with digital tools and ethical marketing. Bulgaria and Germany prioritize digital competencies such as data analytics and AI, making them essential for modern marketing strategies.

Spain stands out in offering continuous professional development programs, ensuring that marketing professionals stay updated on technological advancements. This contrasts with Bulgaria and Germany, where there is a greater focus on technical skills like AI and automation.

3.2.2. Corporate Strategies and Sustainability Integration

There is a broad consensus across countries that companies need to integrate sustainability into their operations. Italy and Spain emphasize the role of corporate strategies in fostering sustainability, whereas Bulgaria and Germany focus on transparency and honesty in marketing practices.

Portuguese and Spanish companies appear to be more customer-driven, seeking to balance sustainability initiatives with cost concerns and technological advancements. Germany presents a divided perspective: while some view sustainability as a luxury, others advocate for its integration from the outset. Spain and Italy show a more structured approach by incentivizing businesses to adopt sustainable strategies.

3.2.3. Role of Regulations and Public Institutions

Spain and Germany advocate for stringent regulations to combat greenwashing and promote transparency in marketing. Bulgaria and Portugal focus on providing guidelines and incentives to businesses adopting sustainable practices. Italy, on the other hand, highlights the need for early education to foster sustainability values from a young age, fostering a long-term cultural shift.

Public institutions in Portugal take an active role in educating citizens about sustainable consumption, similar to Spain's approach of offering financial incentives for sustainable business practices. Germany and Bulgaria stress the importance of collaboration between businesses and government bodies to shape best practices.

3.2.4. Technology and Innovation in Sustainability

Bulgaria and Germany emphasize the role of digital tools like AI, automation, and SEO in enhancing sustainability efforts. Spain and Italy focus more on the ethical implications of technology in marketing, ensuring that sustainability remains a key concern rather than an afterthought.

Portugal prioritizes technological updates to maintain competitiveness while balancing cost constraints. In contrast, Germany promotes collaboration with creative agencies and local partnerships as part of a broader sustainability strategy.

3.3. Conclusion

The focus groups reveal that while all five countries recognize the importance of digital marketing, sustainability, and digital competencies, their approaches differ based on educational structures, corporate priorities, and regulatory frameworks. Spain and Portugal emphasize practical and ethical sustainability integration into marketing degrees, while Bulgaria and Germany focus on advanced digital skills and transparency. Italy, with its strong emphasis on early education, seeks to build a cultural foundation for sustainability over time.

Despite these differences, a common thread emerges: the need for continuous learning, corporate accountability, and supportive regulations to ensure that sustainability remains at the forefront of digital marketing practices. By understanding these varying approaches, policymakers, educators, and businesses can collaborate more effectively to drive meaningful progress in sustainable marketing across Europe.

4. Comparative Analysis

The comparative analysis of the survey and focus group findings provides a comprehensive overview of the key digital and sustainability skills required for marketing professionals in Europe. By integrating quantitative insights from the survey with qualitative perspectives from the focus groups, we can identify common trends, gaps, and divergences across different stakeholder groups and countries.

4.1. Common Findings Between the Survey and Focus Groups

Across both data sources, the following trends emerge:

1. Strong Emphasis on Sustainability and Digital Competencies

- Both the survey and focus groups highlight the increasing relevance of sustainability and digital skills in marketing.
- *GreenComp* and *DigComp* competencies such as Strategic Communication, Circular Economy, and Digital Collaboration are widely considered essential for the future workforce.
- Businesses are shifting towards sustainable practices, and marketing professionals must align with this trend by integrating sustainability into their communication strategies.

2. Need for More Practical Training

- Respondents from both sources emphasized that while sustainability and digitalization are covered in some curricula, they often lack hands-on application.
- Marketing education should include case studies, industry projects, and real-world digital tool applications to bridge the gap between theoretical knowledge and market needs.

3. Digital Security and Data Privacy as Emerging Priorities

- The survey data revealed that *Protecting Personal Data and Privacy* scored the highest among digital skills.
- Focus group participants echoed this concern, emphasizing the need for ethical digital marketing practices, compliance with data protection laws (such as GDPR), and enhanced cybersecurity awareness.

4. Sustainability as a Core Business Strategy, Not Just a Trend

- Companies see sustainability not only as a regulatory requirement but as a key factor influencing consumer decisions and brand trust.

- The focus groups particularly stressed that transparent communication and avoiding greenwashing are crucial in sustainable marketing.

4.2. Key Differences Between the Survey and Focus Groups

While there is a high degree of alignment between the two sources, some differences were noted:

Aspect	Survey Findings	Focus Group Insights
Competency Prioritization	Digital security and data privacy ranked highest among digital skills.	Sustainability literacy and circular economy were more frequently discussed as critical areas.
Sustainability in Education	Respondents acknowledged its importance but rated it lower than digital skills.	Participants emphasized that sustainability education should start earlier and be embedded across subjects.
Practical Training	Lack of applied learning was noted, but solutions were not fully explored.	Industry representatives suggested internships, collaborative projects, and business partnerships as ways to improve practical training.
Green Marketing Strategies	The survey indicated that sustainability is important but did not specify how it should be integrated into marketing.	Focus groups provided concrete examples, such as green certifications, ethical storytelling, and corporate social responsibility campaigns.

4.3. Country-Specific Insights

Each participating country displayed unique priorities and approaches to sustainability and digitalization in marketing education:

- **Spain & Portugal:**
 - Strong focus on ethics in marketing and integrating sustainability modules into business curricula.
 - Emphasize practical training and digital literacy in university programs.
- **Italy:**
 - Prioritizes early education on sustainability to create a long-term impact.

- Views sustainability as a societal value, not just a business imperative.
- **Germany & Bulgaria:**
 - Emphasize data analytics, AI, and automation in digital marketing education.
 - Concerns over regulatory frameworks and greenwashing were stronger in these countries.

4.4. Identified Gaps and Opportunities

1. Mismatch Between Market Needs and Educational Offerings

- While sustainability and digital skills are seen as essential, current curricula do not fully reflect these needs.
- Focus group participants suggested a modular approach that allows students to specialize in sustainability or digital marketing.

2. Lack of Standardized Competency Frameworks

- The survey revealed variations in how sustainability and digital skills are taught across different educational institutions.
- The development of a unified competency framework could help create consistency across Europe.

3. Limited Collaboration Between Academia and Industry

- Companies often struggle to find marketing graduates with both digital proficiency and sustainability expertise.
- Universities and VET programs should integrate more work-based learning experiences to ensure students develop practical, market-relevant skills.

5. Conclusions

The findings of this Needs Assessment Report highlight the growing relevance of digital and sustainability competences in the field of marketing. As the industry continues to evolve, it is increasingly evident that professionals must develop a solid foundation in both technological adaptation and environmental responsibility to meet market demands.

The analysis conducted through surveys and focus groups demonstrates that sustainability is no longer a secondary concern but a core strategic element for businesses. The integration of GreenComp competencies, such as *Circular Economy and Resource Stewardship*, *Sustainable Marketing Integration*, and *Strategic Communication*, indicates a clear shift towards more responsible and ethical marketing practices. At the same time, digitalization remains a critical pillar, with *data protection*, *cybersecurity*, and *digital content creation* emerging as key competencies required by industry professionals.

Despite this increasing awareness, gaps remain between market expectations and the current educational offer in Vocational Education and Training (VET) and Higher Education. Many programs still lack a structured approach to integrating sustainability and digitalization into their curricula, often treating these aspects as peripheral rather than essential. The focus groups reinforced the need for a stronger emphasis on practical training, as theoretical knowledge alone is insufficient to prepare students for real-world challenges. Companies and educators alike stress the importance of hands-on experience with digital tools, sustainable business models, and data-driven decision-making.

Another key conclusion is the emerging importance of ethical considerations and digital security in marketing. The survey results placed *Protecting Personal Data and Privacy* among the most highly valued competencies, alongside *Ethical Communication and Consumer Advocacy*. This suggests that marketing professionals must not only be proficient in digital tools but also understand the ethical implications of their use. Transparency, accountability, and responsible data management are increasingly seen as fundamental skills in today's digitalized world.

In response to these findings, the Digistainability Competence Framework has been developed and validated, aligning the most relevant GreenComp and DigComp competencies to form a comprehensive and structured framework. This framework will serve as the basis for future curriculum development, training materials, and certification systems, ensuring that the next generation of marketing professionals is well-equipped to navigate the digital and sustainability challenges of the industry.

In conclusion, this report underscores the urgent need to bridge the gap between education and industry expectations. Marketing curricula must evolve to reflect the growing demand for sustainability and digital proficiency, incorporating practical, ethical, and strategic dimensions into learning pathways. The upcoming phases of the project will focus on translating these insights into actionable educational solutions, equipping students and professionals with the necessary skills to thrive in a rapidly changing environment.

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International Standard Classification of Occupations (ISCO): <https://www.ilo.org/public/english/bureau/stat/isco/isco88/major.htm>

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Annex I: Validation – Transnational Meeting in Tomar

The transnational meeting held in Portugal on 1 and 2 October 2024 served as a key moment for the validation of the digital and sustainable skills framework for the project. As a result of this validation process, a structured methodology was confirmed to define the competences to be included.

During the meeting, participants conducted a comparative analysis of the Focus Groups' results from each country, identifying common patterns and trends. Through this process, the findings were grouped by affinity, allowing for a systematic comparison with the competences outlined in the *GreenComp* and *DigComp* frameworks.

To ensure that the final table of marketing competences reflected only the most relevant and widely recognised skills, an objective criterion was validated for their incorporation. It was confirmed that competences identified in more than two Focus Groups would be automatically included in the project's final framework, ensuring their representativeness and validity.

Following this validation, the consolidated Digistainability Competence Framework was confirmed, integrating digital and sustainable competences from both the Focus Groups and the previously conducted surveys. This combined approach ensures a comprehensive and data-driven competency model.

Through the validation process, the methodology was endorsed as robust and aligned with recognised benchmarks, confirming that the final framework meets the demands of sustainable digital marketing education and the evolving needs of the sector.

List of Geen Comp Skills

At the end of the meeting, it was agreed by all the partners that the most relevant GreenComp Competences would be:

1.1 Valuing sustainability Skills [**Strategic communication, analysis and evaluation**]

1.1 Valuing sustainability Skills [**Sustainable business insight**]

1.2 Supporting fairness Skills [**Diversity, Ethics, and Consumer Advocacy**]

1.2 Supporting fairness Skills [**Integrated Ethical Communication and Engagement**]

1.2 Supporting fairness Skills [**Sustainability Certification and Strategic Application**]

1.3 Promoting nature [**Circular Economy and Resource Stewardship**]

1.3 Promoting nature [**Sustainable Marketing Integration**]

1.3 Promoting nature [**Sustainability Communication and Public Education**]

- 2.2 Critical thinking skills [**Critical Market Insight**]
- 2.2 Critical thinking skills [**Consumer Critical Engagement**]
- 3.1 Futures literacy skills [**Consumer Insight and Adaptive Strategy**]
- 3.1 Futures literacy skills [**Critical and Strategic Foresight**]
- 3.2 Adaptability skills [**Integrated Sustainable Practices**]
- 3.3 Exploratory thinking skills [**Material and Consumption Innovation**]
- 3.3 Exploratory thinking skills [**Consumer-Centric Design**]
- 3.3 Exploratory thinking skills [**Innovative Sustainability**]
- 4.2 Collective action skills [**Sustainability Advocacy**]
- 4.2 Collective action skills [**Leadership and External Synergy**]
- 4.3 Individual initiative skills [**Personal Growth and Action**]
- 4.3 Individual initiative skills [**Innovative Leadership**]

List of Digi Comp Skills

At the end of the meeting, it was agreed by all the partners that the most relevant DigiComp Competences would be:

Safety - Protecting personal data and privacy

Safety - Protecting health and well-being

Safety - Protecting the environment

Safety - Protecting devices

Communication and collaboration - Interacting through digital Technologies

Digital content creation -- Developing digital content

Digital content creation - Copyright and l