

Repères & Analyses Statistiques



Labour Requirements Survey (BMO): Slight rise in planned recruitments for 2011

Key figures for 2011:

1,542,400 planned recruitments, representing an increase of 1.1% compared to 2010

18.0% of establishments intend to recruit in 2011 (-1.7% compared to 2010)

37.6% of planned recruitments deemed difficult (-2.3%)

38.9% of planned recruitments are seasonal (+1.0%)

64.7% of planned recruitments are in the services sector (+2.0%)

The Labour Requirements Survey (BMO) is an initiative carried out by the Pôle Emploi. This survey measures employers' hiring intentions for the coming year, whether new positions or replacements. It also reveals the significance of the difficulties encountered by potential employers and the use of seasonal employment. Carried out in a context of economic recovery, this tenth edition of the survey offers a unique panorama of recruitment perspectives for 2011.

Recruitment perspectives have risen slightly by 1.1% in 2011, at 1,542,400 planned recruitments, divided across the 386 French employment zones (metropolitan France and overseas departments). 18.0% of employers intend to make at least one recruitment in the course of the year – 1.7% fewer than in 2010 – representing a potential 428,400 employers. Consequently, the average number of planned recruitments per recruiting establishment is up, rising from 3.2 to 3.6 in one year.

Excluding structures with no employees, the propensity to recruit is correlative to the size of establishment. This year, however, the percentage of establishments intending to recruit is down in entities of fewer than 50 employees. It is up, on the other hand, in large-scale establishments: more than half of structures with at least 100 employees intend to recruit this year. The level of recruiters also varies according to the sector of activity in question. Potential employers number 14.0% in trade and 15.8% in construction, while the ratio is higher than 20% in personal services (21.9%) and in agriculture (20.4%).

Recruitment difficulties reported by employers have decreased this year, concerning 37.6% of planned recruitments, as opposed to 39.9% last year. Furthermore, among recruitments planned for 2011, 600,100 are related to a seasonal activity (38.9% of all recruitments), a 3.8% increase on 2010.

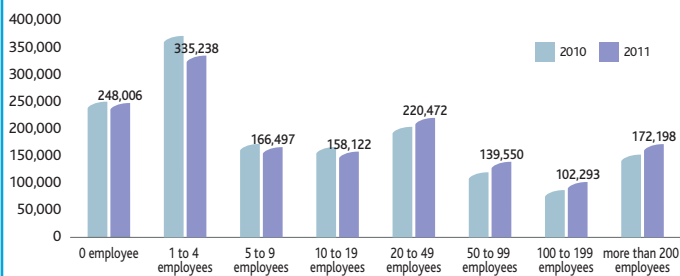
The most sought-after professions

This year again, the most sought-after profiles include a number of professions providing personal services, such as waiting staff, socio-cultural coordinators, catering apprentices or home helps. Business services also offer opportunities for functional and

low-skilled jobs (cleaning staff) or executive positions (engineers and IT managers). Furthermore, several agricultural professions (vineyard workers, tree growers, pickers and farm employees) remain among the profiles most sought-after by employers: they account for 9.4% of all needs expressed, most often under seasonal contracts.

Graph 1

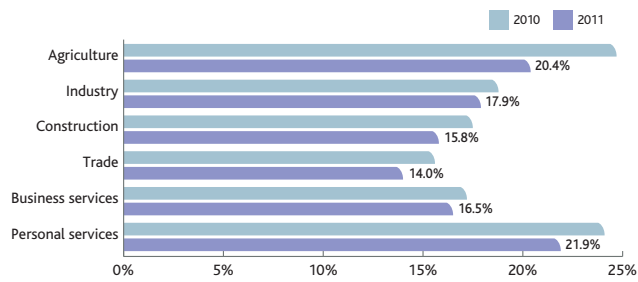
Evolution of planned recruitments by size of establishment



Source: 2011 BMO Survey, Pôle emploi – Crédoc

Graph 2

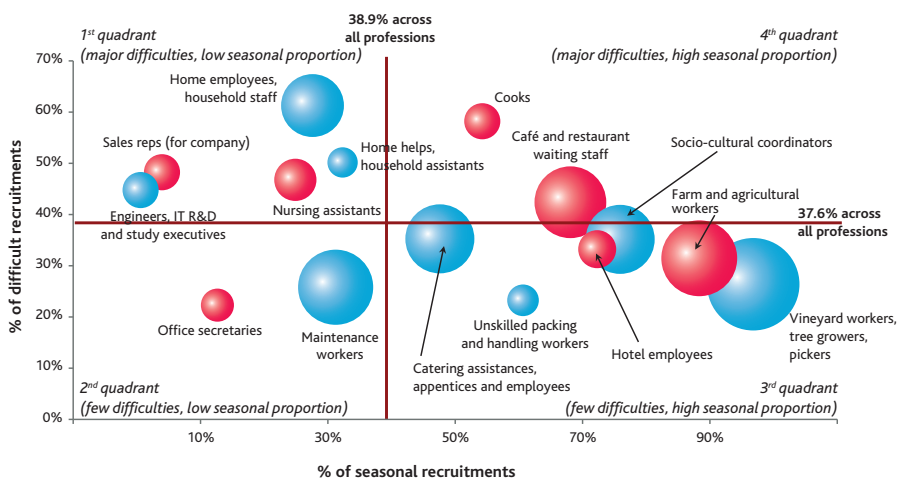
Proportion of recruiting establishments by major sector of activity



Source: 2011 BMO Survey, Pôle emploi – Crédoc

Graph 3

Positioning of the 15 most sought-after professions according to difficulties in filling them and their seasonal nature

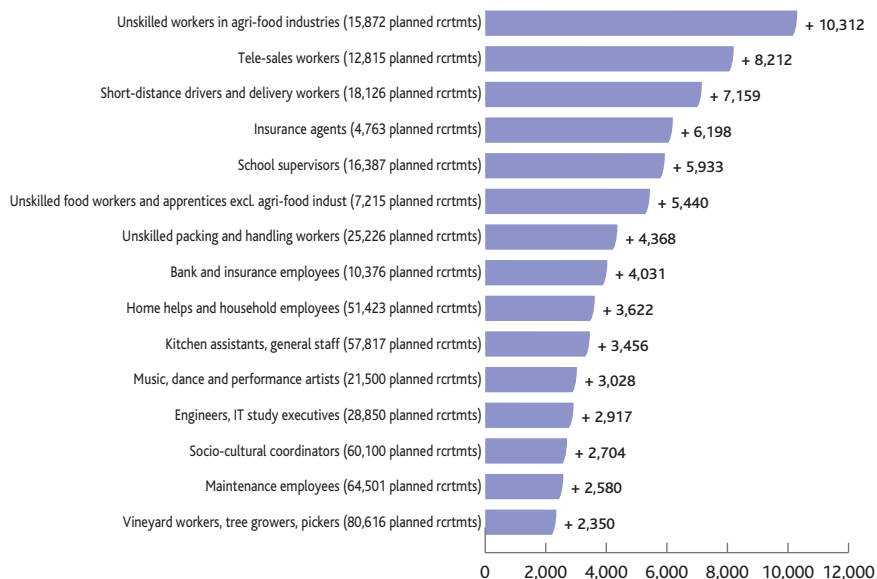


Source: 2011 BMO Survey, Pôle emploi – Crédoc

Note: the size of each sphere is proportional to the number of planned recruitments. Professions where the number of planned recruitments is up compared to 2010 are shown in blue, those which are down are shown in red.

Graph 4

The largest changes in the number of planned recruitments compared to 2010



Source: 2011 BMO Survey, Pôle emploi – Crédoc

Note: This year, there are 80,616 recorded planned recruitments of vineyard workers, tree growers and pickers, representing 10,312 more than in 2010.

An examination of the 15 most sought-after professions shows four main groups:

- catering professions (cooks, waiting staff), for which there are major difficulties in terms of recruitments and where the vacancies to be filled are mainly seasonal (4th quadrant of illustration 3);
- professions with few difficulties in terms of recruitment and where labour requirements are mainly seasonal (3rd quadrant). This concerns vineyard and farm workers, as well as socio-cultural coordinators, hotel industry employees, catering apprentices and unskilled workers involved in packing and handling;
- professions to be filled relating to jobs of a more permanent nature and for which employers anticipate recruitment difficulties (1st quadrant). What we observe here are low-skilled profiles involving personal services (home helps, household employees) and the medical sector (nursing assistants), as well as the mainly skilled professions related to business services and trade (sales representatives, engineers);
- office secretaries and maintenance employees, who represent an exception with more or less permanent labour requirements and few difficulties in terms of recruitment (2nd quadrant).

It is in professions such as vineyard workers, maintenance staff, socio-cultural coordinators and engineers that the highest increases in recruitment intentions are seen. Banking and insurance professions have also increased very significantly, along with unskilled workers in the agri-food industries. This category also includes a certain number of diverse, low-skilled profiles (school supervisors, tele-sales staff, delivery workers) showing strong growth.

The personal services sector: leading provider of employment

Accounting for 41.8% of recruitment intentions, personal services continue to represent the most significant source of jobs (+1.3% this year), even though the level of establishments likely to recruit in this sector is down by 2.2 percentage points. This trend is explained in large part by new requirements related to changes in family structures and in the organisation of work-life balance, as well as improved caring allowances. On average, recruiting establishments in this sector plan to make 4 recruitments, compared to 3.6 across all sectors. Among these services, accommodation and catering account for one third of recruitment intentions (-1.3%) with, according to employers, 40.8% of recruitment difficulties and 61.3% of seasonal recruitments. In the field of health and social work (28.0% of planned recruitments in the sector), nursing accommodation for the elderly shows a 19.7% increase in hiring intentions.

Strong growth in planned recruitments in business services

Establishments providing businesses services for 22.9% of all planned recruitments expressed in 2011 and their hiring forecasts are up by 10.1%. Activities in the financial and insurance sector (+21.6%) and in the transport/warehouse field (+17.5%) also contribute significantly to this result, with in-demand profiles such as engineers and IT study executives. Inversely, recruitment perspectives show a decline in the property sector (-7.8%).

Trade negatively affected by the automobile sector

The decline in hiring perspectives has also affected trade (-7.6%) which has seen its contribution to overall recruitments drop by 1.1% compared to the previous year. This contraction is primarily attributable to automobile sales and repairs (-12.2%). The wholesale trade has experienced less of a

decline in its recruitment perspectives (-2.4%), while the situation is quite varied in the retail trade (+9.4% for hypermarkets, -2.9% for supermarkets, -14.7% for specialist clothing stores, etc.). On average, each trade recruiter intends to carry out 2.6 recruitments this year and the proportion of seasonal labour requirements in this area amounts to 37.0% of the total.

The number of planned recruitments in agriculture, although down, remains high

More than one hiring intention in ten comes from the agricultural sector, representing 167,800 planned recruitments, down by 5.5%. The proportion of establishments intending to recruit in this sector has also dropped, from 24.7% to 20.4%. In fewer than one third of cases, recruitments are deemed difficult, and the vast majority are subject to seasonal contracts (89.7%). In this sector, four activities account for three quarters of recruitment intentions. These are the cultivation of vines, pome fruits, cereals and vegetables, and tubers. Vineyard workers, fruit and vegetable pickers and agricultural employees are thus among the most sought-after profiles.

Recovery in industrial employment

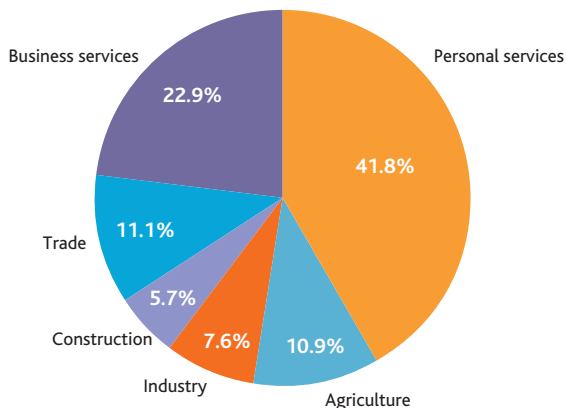
Industry represents just 7.6% of all recruitment intentions. Nonetheless, employment perspectives have taken a favourable direction, with an increase of 10.3% and 117,300 planned recruitments in 2011. This growth is particularly marked in the production of transportation materials essentially intended for the automobile and aerospace industry, in metallurgy and the production of electrical equipment. Indeed, recruitment difficulties have increased slightly, now concerning 40.1% of labour requirements. Agri-food industries also forecast an increase in their recruitment plans (+6.3%), with requirements for staff of various skill levels (unskilled agri-food workers, packers, bakers, salespeople, etc.).

In construction, more than half of all recruitments are deemed problematic

Hiring intentions show their largest decline in the construction sector (-11.2%) where activity, severely hit by the financial crisis

Graph 5

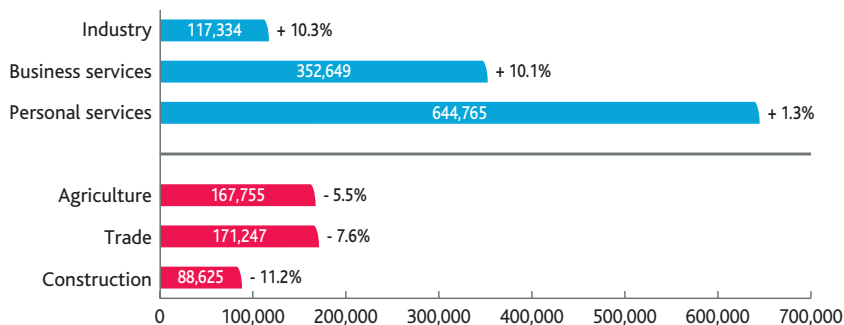
Distribution of the number of planned recruitments by sector of activity



Source: 2011 BMO Survey, Pôle emploi – Crédoc

Graph 6

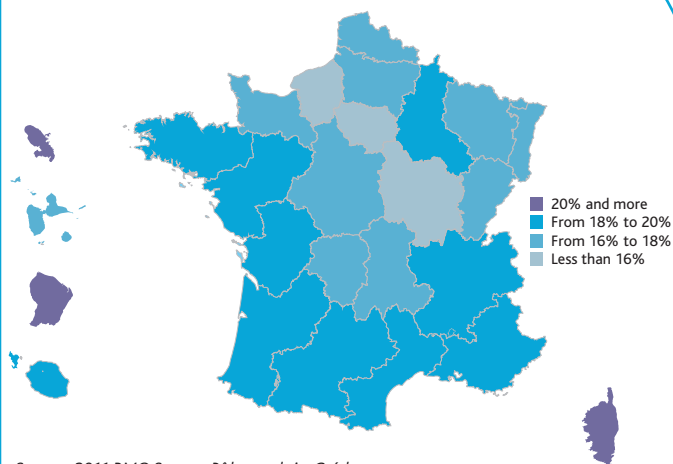
2011/2010 evolution of planned recruitments by sector of activity



Source: 2011 BMO Survey, Pôle emploi – Crédoc

Map 1

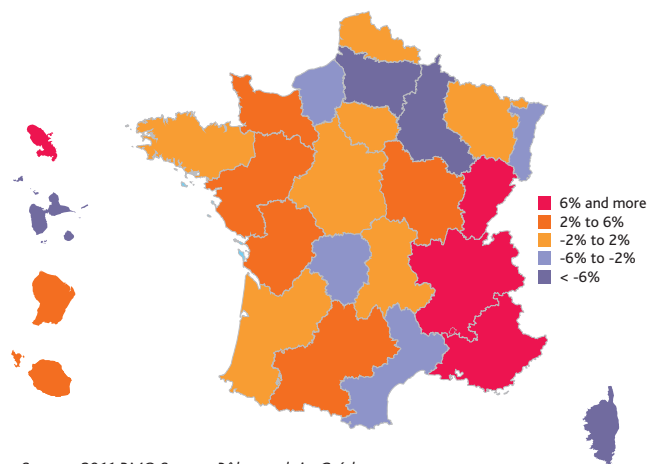
Proportion of establishments planning to recruit



Source: 2011 BMO Survey, Pôle emploi – Crédoc

Map 2

2011/2010 evolution of the number of planned recruitments



Source: 2011 BMO Survey, Pôle emploi – Crédoc

between 2008 and 2010, is now undergoing a tentative recovery. Recruitment intentions are down by 23.0% in civil works and by 8.8% in structural works. The building fittings and finishings sector, normally less affected by economic fluctuations, has lost 9.4% of its recruitment intentions. Despite this fall, employers still consider over half of their planned recruitments to be problematic (53.6%), particularly with regard to skilled fitting and finishing profiles: bricklayers (difficult in 53.7% of cases), plumbers (60.2%) and roofers (73.0%) among others.

Widespread regional drop in the propensity to recruit

The propensity to recruit is down this year across almost all of France. The regions of the south and the Atlantic coast, where around one employer in five plans to hire, have however resisted better than those in a north-west/centre-east diagonal with fewer than 16% of potential recruiters. Generally, tourist and agricultural areas are more inclined to recruit in response to significant staff rotation levels and additional seasonal activity. This is the case in Bretagne, as well as in Champagne-Ardenne, where more than half of all recruitment intentions concern seasonal requirements. Furthermore, the regions of Centre (44.5%), Bourgogne (43.3%), Franche-Comté (44.0%) Corse (49.2%) and Guyane (50.2%) have the highest proportions of planned recruitments deemed difficult by employers. Île-de-France, for its part, retains its specific features: the region accounts for a total of 17.1% of national recruitment intentions,

with a predominance of service activities (in science and technology, IT, health, accommodation and catering, etc.), but its proportion of establishments providing employment (15.6%) remains among the lowest.

Growth in the number of recruitments planned in the south-east

Half of all regions have seen an increase in their number of planned recruitments. This rise is most noticeable in south-eastern France. Certain regions have even enjoyed growth well above the national average (+1.1%). In Rhône-Alpes (+8.2%), Provence-Alpes-Côte d'Azur (+7.3%) and Franche-Comté (+6.6%), business services are largely behind this increase. Inversely, the reduction in planned recruitments shows regional specificities: a marked decline in agriculture and trade in Picardie (-9.4%), in construction in Champagne-Ardenne (-7.7%) and in personal services in Alsace (-6.0%). In overseas departments, the results appear equally uneven: falling sharply in Guadeloupe (-18.0%), but up in Martinique (+25.7%), Réunion (+5.3%) and Guyane (+5.1%).

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SOURCE AND METHOD

The Labour Requirements Survey (BMO) is an initiative carried out by the Pôle Emploi, with all of the regional departments and with the support of Crédoc. The BMO survey is above all a decision-making tool for the Pôle Emploi, allowing it to have a better idea of the intentions of establishments in terms of recruitment and thus adapt financing for training in-demand professions. This survey measures employers' hiring intentions for the coming year, whether new positions or replacements. In addition, the projects concern all types of recruitment, including part-time and seasonal work.

The 2011 BMO survey was conducted between October and December 2010 in the 22 regions of Metropolitan France and the 4 overseas departments. The field of this tenth study is the same as that of last year, i.e. on the one hand, establishments affiliated to unemployment benefit and, on the other hand, establishments with 0 employees having issued at least one recruitment during the previous 12 months, establishments in the agriculture sector, establishments in the public sector related to territorial authorities (communes, regions, etc.), public administrative establishments (inter-communal associations, hospitals, schools, etc.). The survey does not therefore include state administrative bodies (ministries, police, judiciary, etc.) or public companies (Banque de France, RATP, etc.). The questionnaire submitted to employers covers a list of 200 professions which correspond to the official French occupation types (Familles Professionnelles) and were provided in six different versions, in order to adjust the list of included professions to the establishment's sector of activity.

Of the 2,376,500 establishments falling within the scope of the survey, around 1,648,900 were questioned in this way, by telephone or by post. A special procedure was established this year for the largest groups, in order to take account of their centralised recruitment policy. In total, over 422,200 responses were received and exploited for France as a whole. The results were then processed to be representative of all establishments, using an adjustment procedure with defined margins according to the structure of the parent population of the establishments. Furthermore, in order to facilitate interpretation of the results and to enable comparisons between several years, the results of the 2010 BMO survey were reassessed in comparison to the BMO 2011 parent population.