

Repères & Analyses Statistiques



2009 Labour Requirements Survey (BMO) Employers revise down their recruitment forecasts

The eighth edition of the Labour Requirements Survey has recorded 989,400 planned recruitments for 2009 in the 379 zones of employment. After two waves of growth, the hiring intentions stated by the employers have seen a sharp fall this year (-23.8%). The fall in recruitment requirements combined with the increase in job seekers has resulted in a reduction in hiring difficulties which now account for only 43.2% of recruitments (51.1% last year).

The fall in recruitment forecasts initially affects building and civil works and industrial workers (-49.1% and -44.3% respectively). Consequently, there has been a sharp reduction in recruitment difficulties for these profiles.

Conversely, health and social workers seem to have shown better resistance to the fall in hiring intentions (-6.2%). Finally, the most sought-after professions by employers are still sales, tourism and services (household employees: +9.1%).

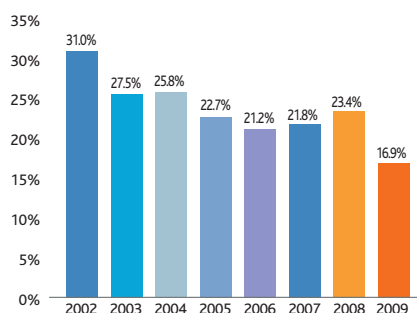
The service sectors have experienced a smaller fall in recruitment forecasts (-14.3%), in particular in the hotel and restaurant sector. Conversely, recruitment intentions have almost halved in the manufacturing and construction industries (-47.9% and -46.8% respectively).

Changes on a regional level also confirm a certain consistency. Recruitment projects are still largely concentrated in the most economically-dense regions.

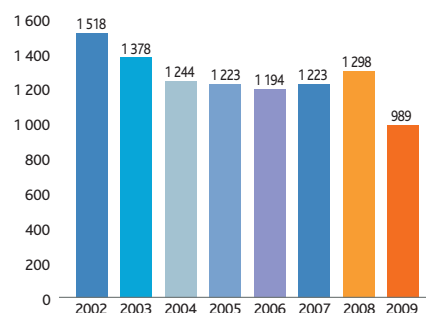
Recruitment intentions have fallen by 23.8% this year, to 989,400. This figure, the lowest since the survey was launched in 2002, is below the symbolic hurdle of one million recruitment projects for the very first time. This change stems from the decline in the number of potential recruiters: only 16.9% of employers are planning on recruiting against 23.4% last year. The fall in hiring intentions affects establishments of all sizes, across all sectors of activity, but in varying degrees.

The difficulties in recruiting expressed by employers have tended to fall, a logical consequence of the reduction in labour requirements. These difficulties now account for only 43.2% of recruitment projects against 51.1% last year. Again, the reduction in the ratio tends to cover all of the economy. In addition, 28.7% of the recruitment projects registered this year are related to seasonal work, that is 3.6 points higher than last year's figure.

Change in the proportion of establishments planning on recruiting



Change in the number of planned recruitments (in thousands)



Source: 2009 BMO Survey, Pôle Emploi - Crédoc

Sales, tourism and services positions are still highly-sought after by employers

This year once again, these roles have a leading position amongst the different groups of professions. They not only contribute to 40% of all recruitment projects formulated in 2009, but they have also been subject to one of the lowest reductions in hiring forecasts (-13.0%) this year [cf. graphs 1 and 2]. This is essentially due to the employers of services to individuals who still have a considerable number of projects, particularly in tourist-related activities (hotel staff, receptionists, cashiers etc.). The majority of these profiles are characterised by use of seasonal staff which is greater than the national average and by few hiring difficulties [cf. graph 3]. Chefs are an exception, with recruitments deemed problematic by employers in 57.2% of all cases.

However, the large number of one-off recruitments for these profiles implies that the contribution of this group of professions to the total number of projects would be lower if we considered permanent positions only.

Medical-social positions: recruitment difficulties remain high

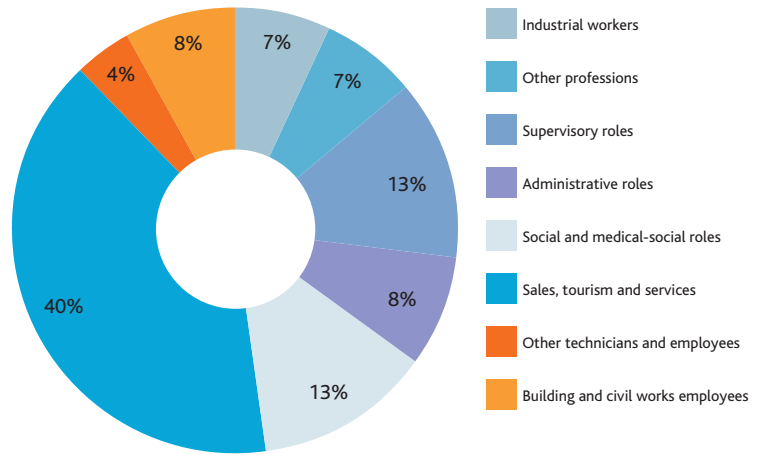
The professions of the medical-social sector are also amongst the most dynamic, with a fall in labour requirements of only 6.2% against 2008. They account for 12.5% of all projects formulated by employers, that is 124,100 hiring intentions, and essentially concern qualified medical and social positions (e.g. nursing assistants and nurses). These profiles, which are increasingly in demand since 2005, are essentially required for permanent positions and are considered as particularly difficult to recruit [cf. graph 3]. The proportion of cases deemed problematic is close to 60% for nursing assistants and paramedics and 70% for nurses and midwives. Furthermore, it is the only group of professions for which the number of recruitment difficulties has remained stable against 2008.

Qualified building and civil works employees: difficulties still arise for the majority of projects

After several years of positive change, the number of projects targeted at building and civil works staff has fallen 49.1%, which must be one of the sharpest changes observed in 2009 in terms

Graph 1

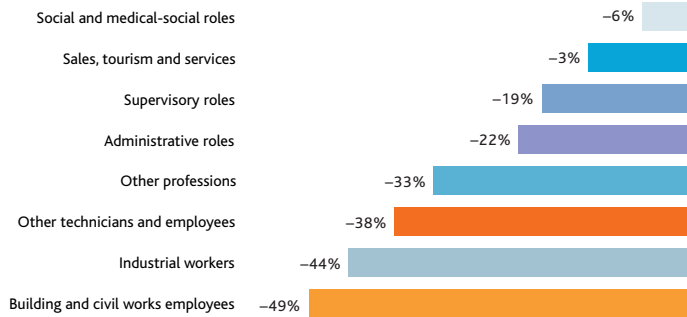
Breakdown of recruitment projects by group of professions



Source: 2009 BMO Survey, Pôle Emploi - Crédoc

Graph 2

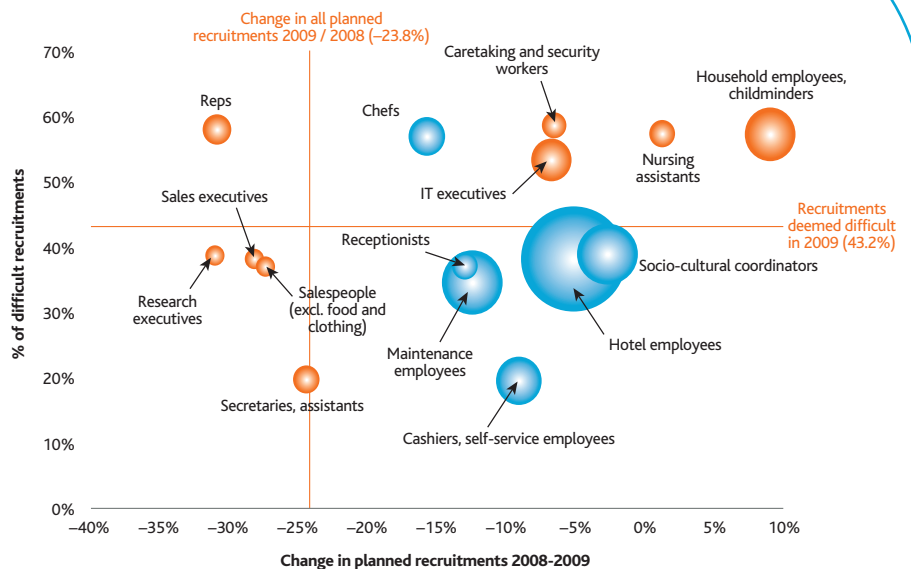
Annual change of recruitment projects by group of professions



Source: 2009 BMO Survey, Pôle Emploi - Crédoc

Graph 3

The 15 most sought after professions by employers in 2009



Source: 2009 BMO Survey, Pôle Emploi - Crédoc

Note: the size of each bubble is in proportion to the number of recruitment projects. The professions represented in the top right section are those which have seen the strongest change compared to 2008 and which meet more difficulties than average out of the total number of recruitment projects.

of groups of professions. This fall affects various types of qualified worker, such as plant machinery operators (-63.3%), qualified masons (-60.9%) or qualified civil works staff (-54.5%). Thus, the level of qualification in this profession type does not, in the current context, protect against the worsening job situation. There has been a 15.1 point reduction in the number of projects deemed problematic. However, employers are still forecasting recruiting difficulties in 60.2% of cases, that is a much higher proportion than in other profession types.

With 74,100 recruitments envisaged for 2009, workers in industry have seen their contribution to the total number of hiring intentions formulated per group of professions fall by 2.8 points, compared to last year.

This decline affects all categories of workers, regardless of their level of qualification and the branch of industry in which they work. However, non-qualified workers in the food-processing industry have seen a smaller drop in hiring intentions (-9.5% compared to 2008). This is also the only profession for which employers use non-permanent positions on a huge scale. Indeed, 74.4% of these projects are linked to seasonal activity (e.g. machine operators). Thus, the smaller drop in hiring forecasts in this profession is essentially explained by the continued number of hiring intentions for non-permanent positions (-0.3% compared to 2008) which hold a larger share of projects (+6.9 points).

Amongst the service sectors, tourist activities resist the most

The service sectors have seen a less unfavourable change in hiring intentions [cf. graph 4]. Indeed, employers have reduced their labour requirements by 14.3% compared to 2008, that is a reduction that is significantly smaller than that observed as a whole. Recruitment projects have undergone a sharp fall in the transport sector as well as in finance and insurance (-35.7% and -36.2% respectively). Conversely, services to individuals seem to have displayed better resistance to the deterioration in hiring forecasts. Tourist activities have been the main contributor to this result. Indeed, the traditional hotel and restaurant sector still attracts a large share of the projects, whilst camping and fast food are some of the rare sectors with a rise in hiring intentions (+3.2% and +10.4% respectively).

Hiring forecasts remain stable in the health and social sectors, with 11.8%

of projects formulated in 2009. This is principally due to the social sectors, in particular accommodation for the elderly (+5.6%). The rise in hiring intentions in these sectors corresponds to a structural trend related to demographic changes, specifically the ageing of the population and increase in average life expectancy. It is also strengthened by public policies in favour of home help. Consequently, recruitment difficulties have barely changed since last year (-1.0 point) but still affect almost one in two projects.

The trade sector has reduced its hiring forecasts by 28.2% compared to 2008. This reduction stems essentially from the automobile sector as well as vehicle maintenance and repairs (-55.3% and -49.6% respectively). Recruitment intentions have also shrunk significantly in the wholesale sector (-37.0%). With a smaller reduction of projects in food-based mass distribution (-10.9% for supermarkets and -13.4% for hypermarkets), the retail sector once again appears to be the most dynamic sector.

Building and civil works, also down in the fittings and finishings sector

Recruitment intentions have almost halved in construction. The number of projects has plummeted in both structural work and civil works (-56.4% and -39.5% respectively). These two trades quickly reflect the economic situation due to

the fall in building start-ups in the new housing sector. Projects are also down in the fittings and finishings sector (-41.2%), despite being a trade which is less sensitive to changes in the economy as it essentially concerns renovations, which are less affected by economic shocks.

In manufacturing, the observed rise in hiring intentions over the last two years saw a sharp turnaround in 2009 (-47.9%). Production of transport materials has seen a spectacular fall in terms of projects (-72.5%), mainly due to the automobile industry. There has also been a substantial fall in metallurgy (-68.3%) and rubber production (-57.8%). However, recruitment difficulties remain high in industry, with 47.0% of projects affected in 2009.

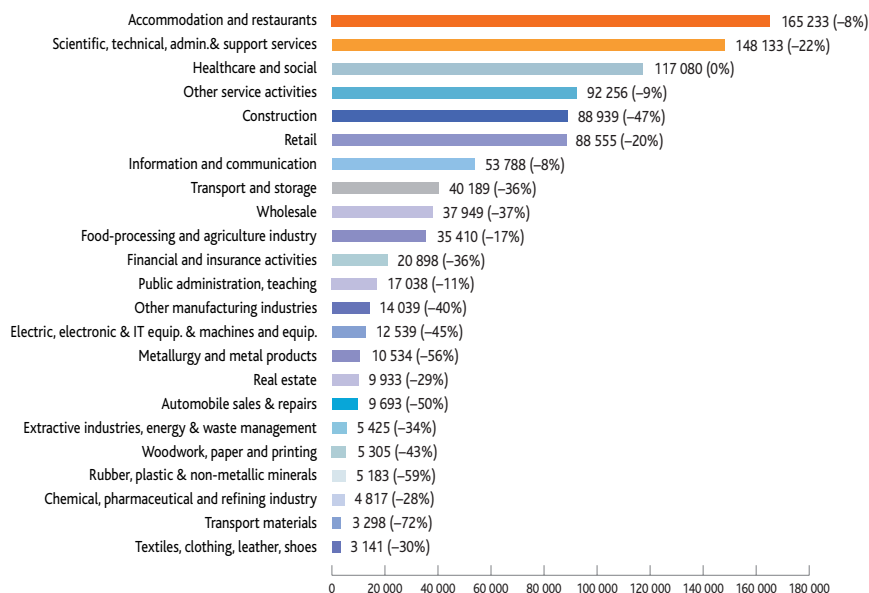
In less industrialised areas, recruitment projects are less dynamic

The number of recruitment projects is in close correlation with the total workforce in each region. Thus, hiring intentions are highly concentrated in the five main regions (Île-de-France, Rhône-Alpes, Provence-Alpes-Côte d'Azur, Aquitaine, Pays de la Loire) accounting for half (55.5%) of all recruitment projects.

The most touristy regions have seen an increase in projects related to seasonal activities. If we count only those projects for permanent staff, we observe a clear

Graph 4

Number of recruitment projects per sector and change on 2008

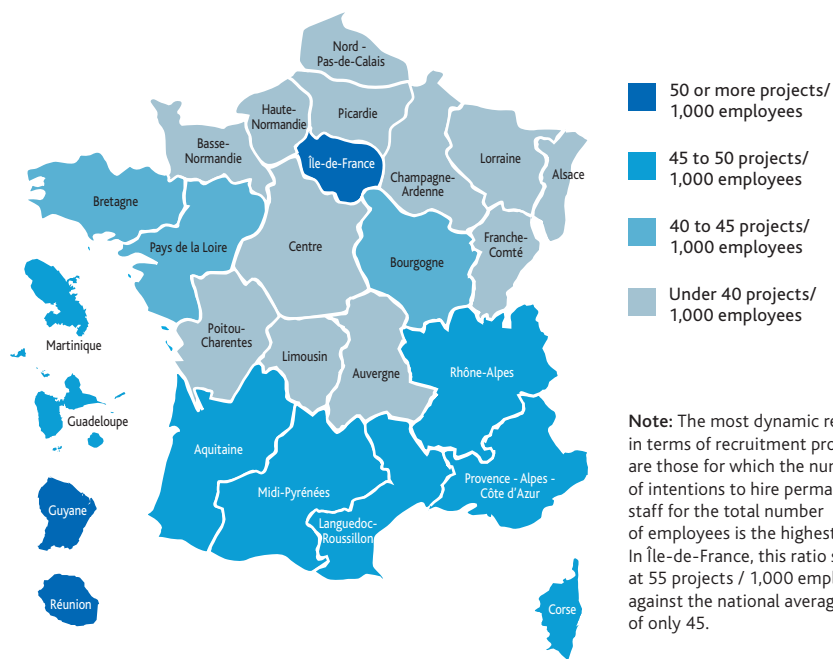


Source: 2009 BMO Survey, Pôle Emploi - Crédec

divide throughout the country in terms of the relative contribution to recruitment projects.

To highlight the geographical disparities, the French regions are represented according to the density of permanent projects by person employed [cf. map]. With some 705,500 intentions to hire permanent staff for 15,689,000 employed persons within the scope of the survey, this indicator amounts to 45 projects for 1,000 employed staff on the national scale. On a regional level, it varies from 31 projects for 1,000 employed persons (Limousin) to a maximum of 101 (Guyana). With a ratio of 55 projects for 1,000 employees, Île-de-France is also amongst the most dense regions in terms of hiring intentions. This region alone concentrates 29.2% of planned recruitments for permanent staff (against 24.5% of salaried workers). The south of France (from Aquitaine to Rhône-Alpes), Corsica and the French overseas departments make a larger contribution to permanent recruitment projects (33.9%) than their weight in salaried employment (31.6%). The rest of France, however, is characterised by a lower contribution to hiring intentions. The northern half of the country has a greater industrial sector, which is less likely to recruit this year.

Number of permanent recruitment projects per 1,000 employed persons



Source: 2009 BMO Survey, Pôle Emploi - Crédoc

Widespread fall in hiring intentions in regions of Metropolitan France

The decline in recruitment projects affects all regions of Metropolitan France. The scale of the decline varies, however, depending on local characteristics.

In Limousin, Poitou-Charentes, Upper Normandy and Picardy in particular, the number of recruitment projects has fallen by nearly a third this year. However, this is partly a correction, as these regions saw an increase in hiring intentions in 2008 which was much greater than the national average. Other regions, Languedoc-Roussillon (-16.2%) and Île-de-France (-17.8%) in particular, have seen a softer fall in hiring intentions than the national average (-23.8%).

In the overseas departments, the results are also very contrasting: Reunion (-31.1%) and Martinique (-19.1%) have seen a decline in planned recruitments, unlike Guyana (+6.9%) and Guadeloupe (+13.5%) which have seen a rise. These results should be regarded with precaution, however, as the survey was carried out (November 2008) before the recent events in these departments.

Denis GORCE
Surveys department
Audrey CAPRON
Crédoc

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 professions in need. It 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 2009 BMO survey, the eighth annual survey on this topic, was carried out in November 2008 in the 22 regions of Metropolitan France and the 4 overseas departments.

As for the four previous years, the survey this year is exhaustive. It thus concerns all 1,550,000 establishments affiliated to unemployment benefit and has allowed us to generate results for the 379 zones of employment.

Of course, not all of the companies have replied to this questionnaire, but over 376,000 have done so this year for the whole country. The results were then processed to be representative for all establishments, using an adjustment procedure with defined margins from the structure of the parent population of the establishments. In total, the employers declared 989,400 planned recruitments in 2009. This thus represents on average 2,600 hiring intentions in each zone of employment, which allows us to put forward a reasonable estimation of the most sought-after professions in the majority of these zones.

As for the previous operations, the questions are limited to identifying the professions sought by the employers, and for each of these professions, to recording the difficulties in recruiting and the proportion of seasonal work. A list of 101 professions, compatible with the Operational Trades and Employment Register (ROME) has been created for these BMO surveys.

Managing Editor:
Christian CHARPY
Editor-in-chief:
Bernard ERNST
Design:
PARIMAGE
Translation:
Intermedias
www.pole-emploi.org