Innovations and evolution of employment in the French food retailing. Retrospective and perspectives.

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Abstract

The saturation of traditional formats in the food retail sector is at the origin of the current stagnation in the job market. But, influenced by new consumer behaviours and the impact of new technologies, the transformation of these same formats can lead to the creation of new jobs and to transformations in those jobs. Employees are gradually becoming more qualified, a process driven by the diffusion of new information and communication technologies. Although women fill most posts in the sector, the differential between female and male jobs seems to be diminishing, for reasons probably linked to the intensification of competition. While the percentage of part-time jobs in the sector, most of which are taken by women, is high, it nevertheless seems to be gradually declining due to the economic crisis, as well as to new approaches to managing working hours on an annual basis, and to the encouragement of multi-tasking on the point of employees.

Key words: employment in the food retailing, primary and secondary jobs, full-time and part-time jobs, gender in retail employment.

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Introduction: research questions.

Retail is an important sector of the economy providing a substantial number of jobs, but, in France, rates of growth in the sector have been slowing down over the last few years. This is a worrying phenomenon in terms of perspectives for employment and, as such, is worth exploring.

The food retail sector in France has recently lost some of its dynamism. At the same time, the sector is going through a profound process of transformation, subject as it is to the influence of technological innovations; the globalization of the economy; demographic evolutions including increased longevity; societal evolutions (in relations between men and women, in the composition of families); the scarcity of energy resources; and rules and regulations introduced by national, and even supranational legislation (Dawson 2001, Gratton 2011, Colla 2005, 2008).

Due to these influences, over the course of the last few years increasingly fewer hypermarkets have been opened and the sector as a whole is segmenting and fragmenting into a multiplicity of formats of different sizes, each of them proposing different types of offer.

The traditional mass model based on low prices and rapid rotation is gradually giving way to new approaches in which marketing, service delivery, customer satisfaction and the promotion of client loyalty are increasingly segmented and, at the same time, increasingly important.

These new models, along with the structural modifications currently being implemented in the sector, have important consequences in terms of the evolution and structure of employment and of new demands for skills and qualifications of the labour force. It is important to analyze those consequences in order to understand the evolution of labour demand in the sector (the needs of companies) and to compare that evolution with the offer available on the labour market in the coming years.

The research questions to which this paper intends to suggest what, in view of the exploratory nature of our work, are provisional answers, are as follows:

1) How has employment in the retail food sector evolved, and how can the reduction of the number of jobs in the sector in recent years be explained?

2) What has been the impact of the evolution and transformation of outlets in the food retail sector, and how has the emergence of new formats influenced the structure and nature of jobs? In particular, how have needs for qualifications, full-time and part-time jobs, and the jobs of men and women been impacted?

Shedding theoretical light on the question

In this part of the article, we shall review the main conclusions of the academic literature on the evolution of the retail sector and its approach to employment in reaction to changes in consumer behaviour and to the diffusion of new technologies.

Economic studies on the global evolution of the sector

According to economic theories on retail, the sector is in a phase of low growth and is undergoing a transformation into a more segmented and fragmented form of commerce placing an emphasis on “precise” targeting (Moati 2001, 2011). The first phase of development of the food retail sector was characterized by a focus on large oulets, such as supermarkets and hypermarkets. However, the sector has achieved a very high market share and is approaching a market “saturation” phase.

Thus, growth in the sector can no longer be achieved at the expense of traditional formats (small specialized independent stores), but must find new ways of promoting its offer.

The fragmentation of retail formats seems to imply that supermarkets and hypermarkets are destined to lose market share. Furthermore, technological innovations, notable amongst which is the growth in the use of the internet, provide a plethora of new possibilities in terms of specializing the offer, creating new formats and services, and transforming existing formats. New economic models are emerging in which value creation depends to a high degree on consumer knowledge and competence in relational marketing.

Models of evolution of channels and formats

Wheels of commerce, life cycle and polarization theories, and theories of the "Big Middle" and comparative advantage provide frameworks of interpretation for trends towards different formats and their perspectives of evolution (McNair 1931, Brown 1987, Arnould 2005, Gallouj 2007). For example, wheels of commerce theory helps us understand the growth of discount formats, which is sometimes considered as a reaction to the increase in quality and services and – due to the phenomenon of "trading up" – of prices in supermarkets and hypermarkets. "Big middle" and comparative advantage theories provide a perspective on the development of formats positioned on the market with a view to differentiating themselves by focusing on the quality of their offer and services, while at the same time practicing higher prices than those characterizing discount formats.

The evolution of consumer behaviour and the reactions of firms

Sociologists and experts have highlighted the ways in which retailers react to general consumer and purchasing trends.

In effect, retailers offer low prices and "smart shopping" (Desjeux and Clochard 2013), improve the buying experience (Hetzel 2002), introduce local, more easily accessible outlets (Bergadaà and Del Bucchia 2009), improve the offer of services and solutions, proposing a transition from property to use for certain products (Moati 2001, 2012), and invite clients to collaborate and contribute creatively, drawing attention to their ethical, social and environmental commitment (Lavorata et al. 2007, Lavorata 2008).

In response to changes in consumer behaviour, retailers develop new offers and formats, modifying the offer of existing formats. Furthermore, in modifying and improving their offer, firms adopt new economic models and new transversal strategies: developing and monitoring their private brands (Holt 2004); orienting consumers; personalizing and monitoring their own behaviours (Volle 2012), geomarketing (Cliquet 2002); anticipating demand; controlling all phases of the value chain that contribute to developing experiences associated with the marquee/brand (Lewis and Dart 2010), including innovation and manufacturing products (Breton 2004); new cooperative relations between suppliers and distributors (Cogitore 2003); and coordinating a large number of channels and sales approaches (Niemeyer, Zocchi and Catena 2013).

The impact of strategies and innovations on organizational structures, as well as on human resources and the skills associated with them

Theories of commercial innovation in all its forms – architectural, organizational, customer flow (Dupuis 1998, Gallouj 2007) – help us to understand the evolution of the structures of firms and its impact on labour demand.

According to many scholars, the increasing use of new information and decision-making technologies has encouraged the centralization of functions and a reduction in the number of intermediate qualified staff in points of sale, while at the same time creating additional demand for management functions. At the same time, the popularity of technological equipment (tablets, screens, self-service scanning machines) amongst consumers and sales personnel may well accentuate the consultancy role played by these last in store departments dedicated to technological products (Vanheems 2013).

Evolutions in the field of logistics may reduce the need for personnel working in these activities in points of sale, and alter the hour of workers in stores (Filser et al. 2012).

Labour market theories

Theories on the segmentation of the labour market, notably on the relationship between high and low levels of qualifications, between part-time work and full-time work, between men and women, and between young workers with few qualifications and experienced senior workers (Vignon 2002, Vidaillet and Vignon 2008; Bouffartigue and Pensariès 1994; Maruani and Nicole 1989; Piore 1975, 1978), help us to interpret the evolution of these aspects in retail employment.

These authors have analyzed the way in which the labour market is segmented between primary employment and secondary employment. Job security, high salaries and good working conditions characterize the first. The second includes jobs with little security, low salaries and high turnover.

Secondary employment is a way of externalizing costs, while retaining a certain degree of flexibility. In periods of crisis, workers in the secondary market can be dismissed without affecting the conditions of employment of workers in the primary market.

But some authors have suggested that, in retail as a whole, women are part of the secondary market. In effect, their pay is systematically lower than that of men, and their career trajectories are markedly different (Fache and Waelli 2012; Waelli 2009; Broadbridge 1995, 1996, 1997; Brockbank and Airey 1994a, 1994b; Brockbank and Traves 1995).

Based on this research, we carried out a quantitative study with a view to achieving a greater understanding of the characteristics of the evolution of retail employment over the course of the last twenty years, an important historical period in the growth of the retail sector.

Research methodology

We collected and analyzed structural data published by INSEE on hypermarkets, supermarkets, convenience stores and department stores.[1]

We conducted an initial analysis of our database by calculating the rates of growth of structural economic variables, as well as employment structure variables in each format, notably in terms of jobs for employees with high and low levels of qualifications, part-time and full-time jobs, and men's and women's jobs.

In order to boost the relevance and validity of our results, in the second phase of our research we triangulated our data by comparing results based on the INSEE's Alisse database with those published in the annual reports of the "Observatoire Prospectif du Commerce" between 2005 and 2012,[2] as well as those generated by research on innovations in the retail sector and on labour requirements produced by the CREDOC (Centre for Research on and Observation of Living Conditions).

Main results and discussion

1*) How has employment in the retail food sector evolved, and how can the reduction of the number of jobs in the sector in recent years be explained?*

Concerning the evolution of points of sale (Table 1), we observe:

- A significant increase in the number of hypermarkets and maxi-discount stores between 2003 and 2012, with an average annual growth rate of between 5 and 6%, while the number of supermarkets grew very slowly in the same period.
- A significant increase in the number of new hypermarkets between 2009 and 2012 (a under 30% per year over three years), as well as of supermarkets (a little less than 20% every year over the same three-year period). On the other hand, between 2009 and 2012, the number of new hard discount outlets fell by 38%.
- A slight, but still significant increase in the average surface areas of supermarkets and maxi-discount outlets (a growth rate of a little under 1% per year between 2005 and 2012) and a slight, but still significant, reduction in the average surface area of hypermarkets (0.75%) per year between 2005 and 2012.
- A drop in the average number of cash registers between 2005 and 2012 in hypermarkets and maxi-discount stores (we do not have data on supermarkets).

[1] Our data table is made up of 37 variables relative to the main economic indicators in the sector (turnover, added value, number of firms, number of personnel) and to data on the structures of employment (male/female ratios, socio-professional category, part-time jobs). Deriving from INSEE's Alisse database, these data cover the 15 year period between 1996 and 2010.

[2] These reports segment the sector by format in a different way to the Alisse data. They focus on hypermarket, supermarkets and hard discount outlets, rather than, in the manner of Alisse, distinguishing between hypermarkets, supermarkets (including hard discount stores), minimarkets (convenience stores) and department stores.

In response to decline in demand, the rate of overall growth in the number of outlets, notably supermarkets and hypermarkets, has gradually diminished. This more limited growth in the number of new outlets has been accompanied by a reduction in the average size of the largest outlets (hypermarkets); the associated decrease in the number of employees per outlet has had a negative impact on employment over the last few years.

Table 1- Evolution in the number of point of sale, 2002-2012

Economic data	HM		SM		HD		Total	
	AAGR	TGR	AAGR	TGR	AAGR	TGR	AAGR	TGR
No. of points of sale 2003-2012	5.95	53.56	0.12	1.10	5.23	47.08	2.48	22.30
No. of new points of sale 2009-2012	28.57	85.71	18.69	56.06	-12.78	-38.35	-1.29	-3.88
Average sales area 2003-2012	-0.75	-6.72	0.91	8.17	1.67	15.06	0.92	8.26
Average no. of cash registers 2005-2012	-1.59	-11.11	0.00	0.00	-2.86	-20.00	-0.54	-3.80

AAGR = Average annual growth rate
TCT=Total growth rate for the period
Source: Observatoire prospectif du commerce (2004-20012)

According to Alisse, the retail food sector created a large number of jobs in the period 1997-2010 (Figure 2).

Table 2. Globally dynamic sectors creating more jobs than the average for sectors in France between 1997 and 2010

1997-2010	AAGR[1] of turn-over	AAGR of no. of firms	AAGR of the VACF	AAGR of no. employees	AAGR of labour productivity
Hypermarkets	2.7	5.1	4.8	2.9	1.3
Supermarkets	3.9	0.4	5.3	1.7	3.0
Minimarkets	4.8	7.1	7.5	3.1	3.1
Department stores	1.6	-2.6	3.2	-1.1	5.6
Total	3.5	2.9	3.2	2.7	1.9

1 AAGR = Average annual growth rate.
Source: INSEE’s Alisse database

The annual job creation rate was 2.7%, while over the course of the period, the annual average growth rate in all sectors in mainland France was 0.9%. An analysis of trends in the period 2003-2012 based on data from sector reports enables us to broaden our analysis of INSEE's Alisse database.

In this regard (Table 3), between 2005 and 2012, we observe a significant decline in the total number of employees. This decline continued in 2007, and was even more pronounced in 2008.

Table 3. Evolutions in employment in the food retail sector, 2005-2011

Employment Data	Hypermarkets		Supermarkets		Hard discount		Total	
	AAGR	TGR	AAGR	TGR	AAGR	TGR	AAGR	TGR
No. of employees 2005-2012	-0.52	-3.63	-1.80	-12.62	3.21	22.44	-0.83	-5.84
No. of workers-employees 2005-2012	-0.52	-3.63	-1.95	-13.65	-1.50	-10.52	-1.15	-8.06
No. of supervisors 2005-2012	-0.52	-3.63	-1.80	-12.62	8.35	58.45	0.02	0.12
No. of managers 2005-2012	-0.52	-3.63	0.69	4.85	59.18	414.25	2.35	16.46
% of women 2005-2012	-0.48	-3.39	-1.22	-8.57	-0.61	-4.29	-0.60	-4.19
% part-time jobs 2005-2012	-1.68	-11.76	-4.76	-33.33	-5.56	-38.89	-3.76	-26.32
% full-time jobs 2005-2012	0.15	1.02	0.15	1.03	-1.99	-13.91	0.15	1.03
% short-contract jobs 2005-2012	-1.30	-9.08	-1.66	-11.60	26.12	182,86	-1,46	-10,19
Wage bill 2005-2012	2,70	18.87	3.19	22.34	8.27	57.89	2.81	19.66
Increase in wage bill 2004-2012	-7,33	-58.62	-0.83	-6.67	16.25	130.00	-2.68	-21.43
Promotions 2004-2012	-8.75	-70.00	-5.21	-41.67	-1.00	-8.00	-4.26	-34.09
Resignations 2005-2012	-6.80	-47.62	0.00	0.00	0.00	0.00	-3.97	-27.78

AAGR Average annual growth rate Source: Rapports de branche (2002-20012)
TGR=Total growth rate for the period

To conclude our comments on the quantitative evolution of employment in the retail food sector, we can observe that the high overall growth in employment in the period 1997-2010 (described in INSEE's Alisse database) can be explained in reference to the sharp increase during this period in the number of supermarkets and hypermarkets, which was accompanied by an associated increase in sales area. Driven by the growth in consumption characterizing the period and by the conquest of demand previously served by traditional stores, this growth has more than compensated for improvements in productivity, which were themselves significant.

Stagnation in employment – and its decline over the last few years – revealed by the two databases analyzed can be explained in reference to a decline both in demand and in sales surface areas, which no longer compensate or surpass growth in productivity. In other words, with productivity growing by 2% per year and demand lagging, the sector has begun losing more jobs than it creates.

2) What has been the impact of the evolution and transformation of outlets in the food retail sector, and how has the emergence of new formats influenced the structure and nature of jobs?

The data analyzed enables us to provide answers concerning, notably, the distribution of jobs requiring either more or fewer qualifications, of full-time and part-time jobs, and of jobs done by men and women.

Qualifications required for jobs and modifications to the structure of employment. The general decline in the number of employees in the sector is mirrored by the fall in the number of workers and employees in the three main formats, and by the decrease in the number of supervisors (except in department stores, in which there was an increase of 58% during the period in question; see Table 3). However, in the same period, the number of managers in the three formats rose by 16%. We also observed an increase in the number of managers in the food retail sector (which, furthermore, mirrors the same trend in the economy as a whole).
Since 2005, the number of managers as a percentage of the total work force has increased (up 2.1 points to 16.1%), as has the number of intermediary professions (up 1.2% to 23.5%); during the same period, the percentage of workers and employees dropped (respectively by 2.7 points to 20.8% and 1.2% to 28.1%). (Source: INSEE).

This increase in the number of managers was also confirmed by the growth in the wage bill and the concomitant drop in the number of employees and salary increases, as well as promotions. These factors demonstrate that fewer employees were benefitting from higher salaries.

The Alisse database reveals that only in minimarkets has the number of managers decreased, a phenomenon that can be at least partially explained by a growing emphasis on the part of major retail firms that have invested in this sector on franchises and similar types of contract (CREDOC and Gester 2008).

How should we interpret this data concerning the decline in the number of intermediary professions and workers, and the increase in the number of managers and employees in all formats?
Ongoing transformations in the food retail sector, as well as the development of new formats and the growth of the multi-channel approach seem to have caused a segmentation between jobs requiring more qualifications and those requiring fewer.
The demand jobs requiring few qualifications at last partially depends on the growth of certain new formats and services (for example, drive-in outlets), but the data also reveal an increase in the number of jobs for which managerial and relational skills and techniques are required
Originally, these trends were, in line with the results of our analysis of the literature, characterized by a focus on consolidation, the increasing size of firms, and the professionalization of networks of small and medium-sized stores.
The increasingly high level of qualifications required in supermarkets and hypermarkets seems to be coherent with the continuous development of a trend towards a strong focus on marketing (developing retail brands, geomarketing, targeting clients and promoting client loyalty) and sales (reception, merchandizing and improving the atmosphere in stores), accompanied by an increased diffusion of new information and communication technologies, such as in-store selling aid tools.
All these activities require personnel who are qualified in specific areas. Other activities imply the need, notably in head offices, for legal, statistical, accounting, financial, logistical and IT skills.

As in the case of marketing techniques, it is difficult to acquire these skills exclusively by working in-store, and most employees do not do so. Candidates for such posts tend to be recruited from outside the company. This is confirmed by, albeit partial, qualitative analyses (Riecau and Salognon 2013), as well as by our data, which attests to a substantial reduction in the number of promotions over the course of the last few years.
Meanwhile, sales techniques are more easily accessible via training programmes. These techniques are, more generally, of interest to employees/workers who are likely to come into contact with customers, either occasionally or on a regular basis. In effect, a large proportion of the training programmes of firms in the sector focus on commerce and sales, with a quarter focusing on training programmes based on customer relations (with a particularly noticeable peak in 2009) (See Table 4).

Table 4 - Type de training in the food retail sector

Type of training expressed as a %	2005	2006	2007	2008	2009	2010	2011	2012
Sales	35	28.5	30	29	42	34.6	32	26
Logistics	8	7.5	3	6	6	5.2	5	8
Technical product knowledge	10	8	9	14	9	6.2	6	
Administration	7	5	3	5	3	4.4	5	
HR including management	25	24	25	16	10	20.1	14	15
Hygiene, Security Maintenance	6	19	20	21	23	21.7	19	26
IT	5	7	7	8	5	6.6	8	
Languages	0.1	0,5	1	1	1			6
Others	3.9							
Sales breakdown	2005	2006	2007	2008	2009	2010	2011	2012
Sales, Customer relations	18	22				24	18	
Cashiers	3	3				5.3	5	
Merchandising Marketing Advertising	3	1.5				4.1	9	
Product displays Shop windows	1	1.5				0.9	1	
Purchasing	0.3	0.5				0.2	0.19	
Unspecified	9.7							

Source: adapted from sector reports, 2005-2012.

An emphasis on the fresh produce offer is another basic trend characterizing the restructuring and differentiation of food retail brands. Some research on the structure of employment enables us to more easily identify the most sought-after employee skills (Crédoc 2011, 2012; Crédoc et Geste 2008). Amongst other things, the research highlights cash register operators, self-service employees, and salespeople, notably in non-food outlets, but also in bakers and butchers.

Full-time and part-time jobs. Part-time work, which had, by the year 2000, attained high levels, had begun to decline by 2001. This process that has accelerated over the last few years (Table 2), essentially as a consequence of the stagnation of the food retail sector and the introduction of full-time contracts compatible with the flexible use of employees in multiple fields. This trend is characteristic of all formats with the exception of department stores (Alisse data) where, on the contrary, part-time contracts have become more common, as has the employment of women.
Part-time jobs thus seem to be attuned to the conjuncture characterizing the sector: the trend towards part-time contracts is most pronounced in years in which growth is highest, when companies are able to increase their margins as much as possible (a phenomenon linked to the Galland Law authorizing price increases). On the other hand, in the more difficult years following the introduction of the version of the Galland Law radically modified in 2008 by the LME, the number of part-time contracts has decreased, not only due to the difficult economic situation, but also to the reduction in margins that followed this reform.

This drop in the number of part-time jobs in the sector is probably linked to the quest for a quantitative optimization of the use of manpower, and, therefore, of cost reductions, in a phase of economic crisis in which pressure on margins is high.
These data confirm that part-time employment is a variable of adaptation in terms of the economic conjunction and the intensity of competition faced by firms in the sector.
It should be noted that, although it has declined in recent years, the percentage of part-time posts held by women (approximately 50%) is much higher than the percentage of jobs held by men (approximately 26%).
In terms of perspectives, the return to a positive sales trend in the sector could lead to a gradual increase in the recourse to part-time jobs, as long as competition does not intensify.

Employment of men and women. Women have always accounted for a high percentage of jobs in the retail sector in comparison with other sectors. Although declining, the percentage of women's jobs in the retail food sector is very high (around 75%) in department stores (Alisse data), while in supermarkets it is slightly higher than the average (around 65%) and seems to have stabilized over the course of the last few years.
In department stores, this phenomenon can be explained by the structure of their offer and their focus on service. Department stores place more emphasis than supermarkets on non-food products, particularly on perfume, hygiene and beauty products, and textiles and clothes.
On the other hand, the percentage is lower than average (around 60%) in hypermarkets and minimarkets, and, in recent years, has displayed a downward trend that has been more pronounced in minimarkets than in hypermarkets.
In regard to hypermarkets, this differential can be explained by the lower levels of customer service provided and the physical nature of the work of done by employees. The trend to reduce the number of women in the labour force can also be linked, at least partially, to a reduction in the number of part-time jobs, most of which are done by women. Meanwhile, the integration of women into the leading firms in the sector and the process of rationalization and standardization by which it is accompanied probably play a role in encouraging this trend.
The decrease in the percentage of women filling these posts can be partially attributed to the limited increase in the number of department stores and supermarkets, while the stronger growth of minimarkets (in which women are taking fewer jobs) does not compensate for that decline.
The growth in employment of men in periods of crisis suggests that women's jobs in general are less secure in those periods, during which, as we have seen, the percentage of part-time jobs declines. In terms of professional categories, around 90% of women are employees and workers are women. In this category, they accounted for around 60% of total jobs in the sector in 2012. In the same year, 45% of supervisors and 20% of managers were women. But the percentage of women in these last two categories has gradually increased over the last few years and this trend looks set to continue.
In spite of this, it would appear that the fact that part-time jobs are less secure than full-time jobs, and that, in general, women's jobs require fewer qualifications than those of men, confirms the idea that female employment belongs to a "secondary" category within the labour market.
In terms of perspectives, since the growth forecasts of both department and hypermarkets are not positive, and since the percentage of women employed in minimarkets, the number of which is increasing, is below average, it seems probable that the number of posts occupied by women in the sector will continue to decline.

Managerial implications
The implications of our research could be of interest to Human Resources departments in the retail sector and business schools, as well as to directors of education and training institutions, both regionally and nationally.
Human resources departments in the sector could apply the study to the recruitment and management of employees and managers in the various formats of their outlets and central structures.
Business schools could take inspiration from the study to improve the recruitment and education of their students. The growth in the number of managers in the food retail sector could, notably, encourage business schools to focus on this area, which has, up to now, received relatively little attention. The emergence of new formats and services such as drive-in stores renders necessary, in

particular, training programmes in new technologies and their applications to the sector (websites, in-store sales aids, logistical techniques, etc.).
Lastly, education and training institutions could use the study to help them focus their resources on the most sought-after profiles and more effectively define the kind of education they provide.

Research limitations and perspectives for the future

Since we lacked data covering significant time periods, we were unable to take into account other variables that play an important role in variations in demand. Amongst these variables are consumer choices, which would worthwhile analyzing.
But light shed by our research on evolutions in employment in the retail sector should make it possible to elaborate scenarios describing future trends in the job market based on hypotheses concerning decisive variables and their impact on demand, productivity and employment.

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