



West Midlands
Regional
Observatory



Regional Skills Partnership
Skills Profile 2005

Retail and
Distribution



Retail and Distribution Sector Profile 2005

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1 Executive Summary

1.1 Introduction

This report provides a summary of critical skills issues facing the Region's retail & distribution sector and highlights:

- Its size and importance to the Region
- Its recent performance and future prospects
- Drivers of skills change and emerging needs
- Qualification attainment within the workforce
- Skill gaps and recruitment difficulties
- Investment in training and workforce development
- Demographic issues and their impact on the supply of skills

1.2 Key findings

The sector is of key strategic importance to the Region. It supports more than 400,000 jobs and is second only to manufacturing in terms of employment. The Region is among the top three retail destinations in the UK and also contributes to the economy in terms of city centre growth, increased tourism flow and increased demand for public transport.

The Region has the second fastest growing retail sector in England, benefiting from a range of major investments in new floor space as part of wider regeneration programmes. There has also been significant investment in new warehousing and distribution facilities in the Region.

A range of developments are driving skills change in the sector, with the increasing adoption of IT applications such as on-line retailing and e-commerce and supply chain

management techniques and an increasing emphasis on customer service as a means of differentiation from the competition. As a result there is an increasing need for sophisticated inter personal, interpretive and sales skills in retail and for multi-skilled staff in wholesaling with expertise in IT and logistics management, communication and sales combined with the ability to work cross functionally and build business relationships.

However, a significant proportion of companies have workforces deficient in these skills. Encouragingly there is evidence that employers are identifying the causes of skill gaps and taking steps to address them. For example, many are investing in further training for the many new and inexperienced recruits within the sector.

However there is still only a relatively limited number of companies, particularly in wholesaling and among those employing five people or less, making this investment. In retailing the region has the second lowest level of training spend per employee in the country and relatively little training investment is targeted at key skill gap areas such as customer service.

Specific issues are inhibiting this investment, notably the affordability and timing of much training provision, the lack of value and importance placed on training by head offices and local managers, many of whom have 'progressed through the ranks' with no formal training, and a lack of time and expertise in identifying training needs. Difficulties in specifying deficiencies in soft skills, which are often seen as 'intangible', are a particular problem.

At the same time, the sector has struggled to access the skills it required from the labour market. A key issue is a lack of interest in working in the sector due to a negative image of low pay, limited opportunities to progress due to the flat structures of many organisations, a requirement for shift working that does not suit family/childcare needs. The sector is often seen as a temporary stop-gap for employment or as a source of part time work.

Encouragingly in the retail sub-sector at least, however, a number of larger employers are looking to address these problems, introducing more flexible working arrangements and targeting groups in the population that represent a significant and growing source of labour and skills such as older people, people from ethnic minority communities and women with innovative recruitment and employment policies. While employers have identified the business benefit of targeting these groups to meet their needs at a time of significant expansion, they also recognise the benefits for social inclusion. It will be important to build on this good practice across the sector.

2 The sector's size and importance

The retail and distribution sector covers a wide range of retail, wholesale and repair activities:

- Wholesale distribution of agricultural materials and animals
- Wholesale distribution of food, drink and tobacco
- Wholesale distribution of household goods
- Wholesale distribution of machinery and equipment
- Retail sale of food, drink and tobacco
- Retail sale of pharmaceutical and medical goods, cosmetics and toiletries
- Other specialist retail outlets
- Department and other non-specialised retail outlets
- Retail sale of motor vehicles, parts and accessories
- Retail sale of automotive fuel
- Maintenance and repair of motor vehicles, parts and accessories
- Repair of other personal and household goods

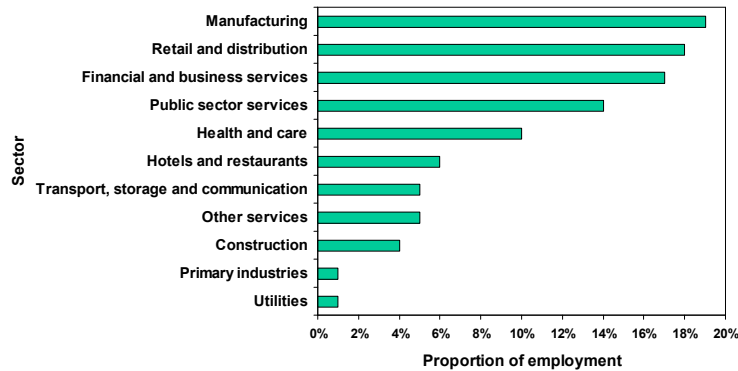
Since the mid 1990's the distinction between retailing and distribution has become increasingly blurred as large retailers have established their own distribution networks, increasingly buying direct from producers. Internet trading has also become more important.

In employment terms the retail and distribution sector is the second largest sector in the West Midlands Region, accounting for 18% of all employment in 2003 and supporting some 420,000 jobs.

Retail & distribution is the second largest sector in terms of employment



Sectoral share of Regional employment in 2003



Source: Annual Business Inquiry

1

The Region is among the top three retail destinations in the UK and is identified as home to some of the largest shopping centres in the UK¹, including:

- Bullring and Gracechurch in Birmingham
- Touchwood in Solihull
- Merry Hill, the Mander Centre and Gallagher retail park in the Black Country
- Lower Precinct and West Orchards, and Clock Towers in Coventry and Warwickshire
- Kingfisher and Weaver's Park in Herefordshire and Worcestershire
- Telford Shopping Centre in Shropshire
- The Potteries, Cooper's Square and Ventura retail park in Staffordshire

¹ SkillsSmart Sector Skills Council

The sector contributes to the Regional economy in a number of other ways, notably in terms of²:

- City centre growth
- Increased tourism flow
- Growth of employment
- Increased demand for public transport

² Experian retail sector rankings 2004

3 The sector's recent performance

The West Midlands retail and distribution sector expanded its output by 12% between 1998 and 2002. The retail sub-sector has grown particularly rapidly expanding its output by more than 30%, a rate of growth exceeded only by the South East.



In the last few years the rate of expansion within the Region's retail sector has accelerated. Major investment in the new Bullring shopping centre has led to Birmingham rising 10 places in the retail super league and is now the UK's most attractive shopping destination after London and Glasgow, according to the 2004 survey of retail vitality. The centre has brought a further 1.25 million sq. ft of retail floorspace to Birmingham city centre including two anchor stores, Debenhams and Selfridges. Flagship stores for Gap, Next, Zara, USC and Benetton are among a further 140 stores³.

³ Retail labour markets and displacement activity across the West Midlands region, Experian, June 2004

In addition to the large-scale Bullring development in Birmingham, there has also been more widespread and less conspicuous retail development across the region. This has been most commonly in the form of retail-led regeneration with refurbishment of aged shopping centres and high streets.

In addition, there are significant future developments planned, under construction or awaiting approval. For example, the 240,000 sq. ft Windmill Park in Cape Hill in the Black Country; the 205,000 sq. ft Rope Walk in Nuneaton, which is under construction; and the redevelopment of the East-West Precinct, resulting in a net gain of 280,000 sq. ft in Hanley, Stoke-on-Trent.

The expansion of the sector has led to the generation of more than 100,000 net new jobs in the Region between 1982 and 2003. Developments that have come on stream since 2003 such as Touchwood and the BullRing centre have created many thousands more jobs.

There have also been significant developments in the wholesale distribution sector with the opening of Hams Hall National Distribution Park in Warwickshire. The development covers an area of some 430 acres (174 hectares) and benefits from an on site inter-modal rail freight terminal. Occupiers include BMW, Sainsbury's, EXEL, Wincanton and DHL⁴.

3.1 Drivers of change

A range of drivers of change are affecting the performance of the retail sector and influencing trends in the demand for skills:

- Intense price competition is leading to shrinking profit margins despite growth in sales volumes. Retailers are responding by investment in technology to increase productivity⁵. In particular on-line retailing, which both speeds up and rationalises the supply chain and improves consumer choice, access and service is becoming more widespread.
- Consumers are demanding continuous improvements in customer service and retailers are increasingly using this to differentiate themselves from the competition.

⁴ <http://www.hams-hall.co.uk/contact.php>

⁵ Skillsmart Sector Skills Council Market Assessment 2004

- One of the most significant changes in the next decade is expected to be the growth of e-commerce, which currently only accounts for a tiny fraction of sales⁶.
- Retailers are taking advantage of global supply chains and the economies of scale they can derive from high volume operations that can serve several countries from one 'hub'.
- Foreign retailers such as Walmart, Zara, Aldi, Netto and Matalan have established a foothold in the UK market, bringing with them new models of business and a further intensification of competition.
- Retailing is characterised by an 'hour glass' mix of companies. There is a relatively small group of major companies that dominate the sector, a middle range of smaller multiples and a numerically large but economically weak group of small independent retailers. In order to compete, these smaller companies need to provide high quality customer care and product knowledge.
- In wholesaling there is an increasing emphasis on supply chain management, connecting the sourcing of raw materials with manufacturing and the end consumer. Customers are increasingly looking to differentiate themselves via the efficiency and effectiveness of the supply chain⁷.
- The warehousing and distribution environment is increasingly becoming one of joint teams involving the logistics provider and the retail client.

Technology has become crucial to the sub-sector in a number of ways:

- To the supply chain process in that they enable the free flow of information across the chain and enable the streamlining operations, reducing in cost savings.
- The internet is removing the need for expensive warehouse space and opening up a role for the distribution company that can deliver direct to the consumer.
- Material handling is now automated with computers loading and unloading pallets.
- Storage has been transformed from a manual system of docketts, pencils and paper to one that is computer driven.

⁶ Working Futures: National Report 2003-04

⁷ An Assessment of skill needs in the retail and related industries; May 2002; Business strategies Ltd

4 Future prospects

Continued growth in employment of 9% is projected within the retail and distribution sector over the next decade, representing the creation of more than 40,000 net new jobs. Growth will be underpinned by a range of investment projects⁸:

- Rugby is developing a plan for a new retail development in the centre, with high-street chains and quality retailers, to draw back custom lost to other retail centres in the region.
- Substantial redevelopment is planned for the Brierley Hill area in Dudley, with the integration of the triangle of Merry Hill, the Waterfront and Brierley Hill. This is aimed at furthering the cohesion of the town centre and promoting Brierley Hill as a new sub-regional centre for business, commerce, retail and leisure⁹.
- In Worcester, the Lowdown mixed-use scheme and the recently completed Shrub Hill retail park, which will effectively extend the city centre and create a continuous retail zone.
- In Stoke-on-Trent the Moxon Island shopping centre, Hanley Market Arcade and the East and West Precinct are to be renovated, with the latter to undergo expansion furthering the retail floorspace by up to 280,000 sq. ft. Tunstall is also to see retail development, with planning granted for retail warehousing and factory outlet schemes to the east and west of the town that together could provide an extra 300,000 sq. ft feet of retail floorspace in the town.
- Wolverhampton City Council has outlined plans for a site to accommodate a mixed-use development to help strengthen the attractiveness of Wolverhampton as a major sub-regional shopping destination. This is a longer-term strategy to maintain the city's share of the expanding retail market in the face of fierce competition from other retail centres including Bullring. The Cleveland Street site to the south of the city covers some 8 acres and is

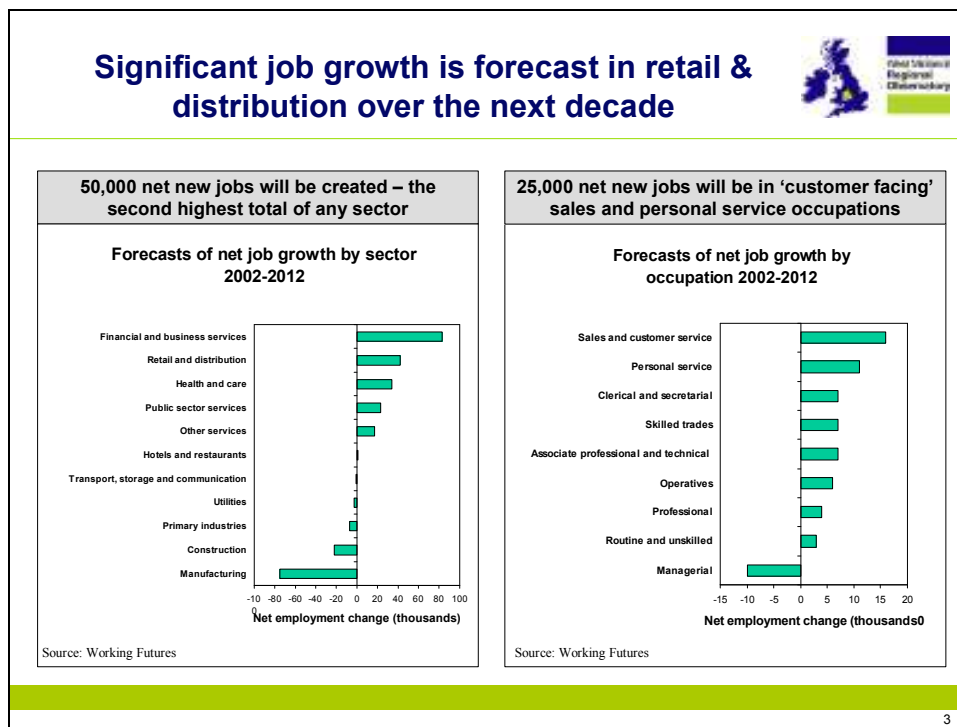
⁸ Experian Research, 2004

⁹ *Dudley Borough Council - Unitary Development Plan*, available at <http://www.dudley.gov.uk/council/plan%5Fapp/udp/udpsum%5Fpart2%5Fbhill.htm>.

capable of accommodating a mixed-use development of around 500,000 sq. ft, comprising up to 300,000 sq. ft of new retail¹⁰.

- Significant redevelopment is planned for West Bromwich to help the town reposition itself as a retail centre and exploit the extensive consumer pool in the locality. The recent opening of the Astel retail park in the town marks the commencement of regeneration. There are further plans to rejuvenate the high street and for a large mixed-use retail development near the ring road comprising 374,000 sq. ft of retail space, anchored by a Tesco hypermarket and another department store.

There is forecast to be a particularly significant increase in jobs in ‘customer facing’ roles with the creation of more than 15,000 jobs in sales and customer service and more than 10,000 jobs in personal service occupations.



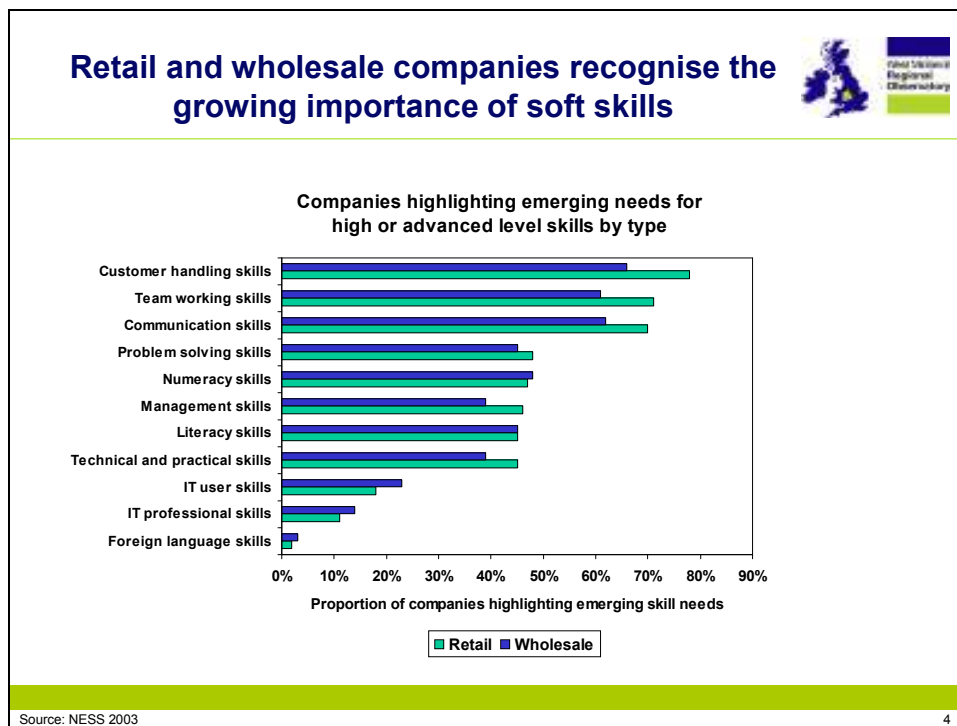
In addition, significant new employment opportunities in the sector will arise due to the need to replace those who leave through retirement, career progression or job change. Available estimates indicate that up to 250,000 employment opportunities could arise in the Region as a result of this ‘replacement demand’¹¹.

¹⁰ *Wolverhampton City Centre Retail Expansion Area – Draft Planning Brief*, available at www.wolverhampton.gov.uk/trenv/plans/cleveland.htm.

¹¹ Working Futures: National Report 2003-04

5 Emerging skill needs

Retail and wholesale companies recognise that, in order to respond effectively to drivers of change and exploit the potential for growth, staff will need to develop sophisticated soft skills. In particular, more than 70% of retailers and more than 60% of wholesalers identify an emerging need for high or advanced communication, team working and customer handling skills.



More detailed research with employers¹² indicates that within the retail sub-sector customer facing staff need to develop the following specific soft skills:

- Interpersonal skills - the ability to provide a friendly greeting and engaging with the customer to understand their needs with appropriate body language and eye contact.
- Interpretative Skills - reading customer signals of needs/wants, recognising regulars, understanding what level to ‘pitch’ information, the right level of eye contact and personal space to give a customer and matching their requirements with stock.

¹² Soft Skills Survey: Retail and Hospitality Skills Task Force;2003

- Sales Skills - the ability to sell as opposed to just serve, converting a browser to a buyer and matching customer requirements with stock to gain a sale.

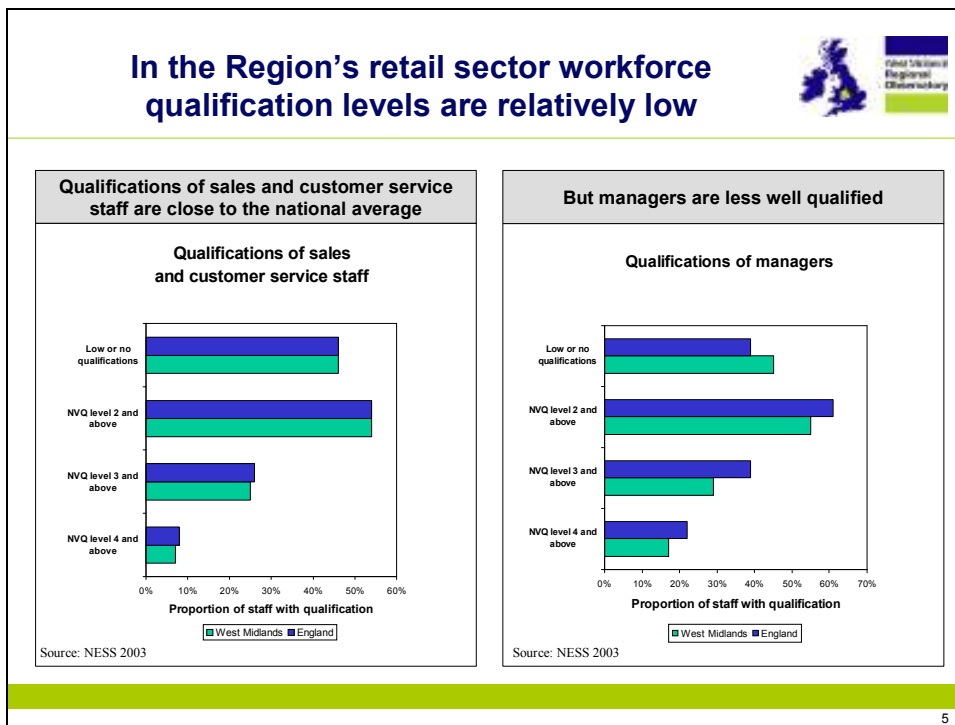
In the wholesale sub-sector automation and computerisation have stimulated an increasing need for staff to become multi-skilled with a mix of soft skills and more technical skills relating to:

- IT and logistics management
- The ability to work cross functionally within an organisation
- Communication and customer handling
- The ability to build business relationships across the supply chain

5.1 Qualification attainment within the workforce

In the Region's retail sector qualification levels are relatively low:

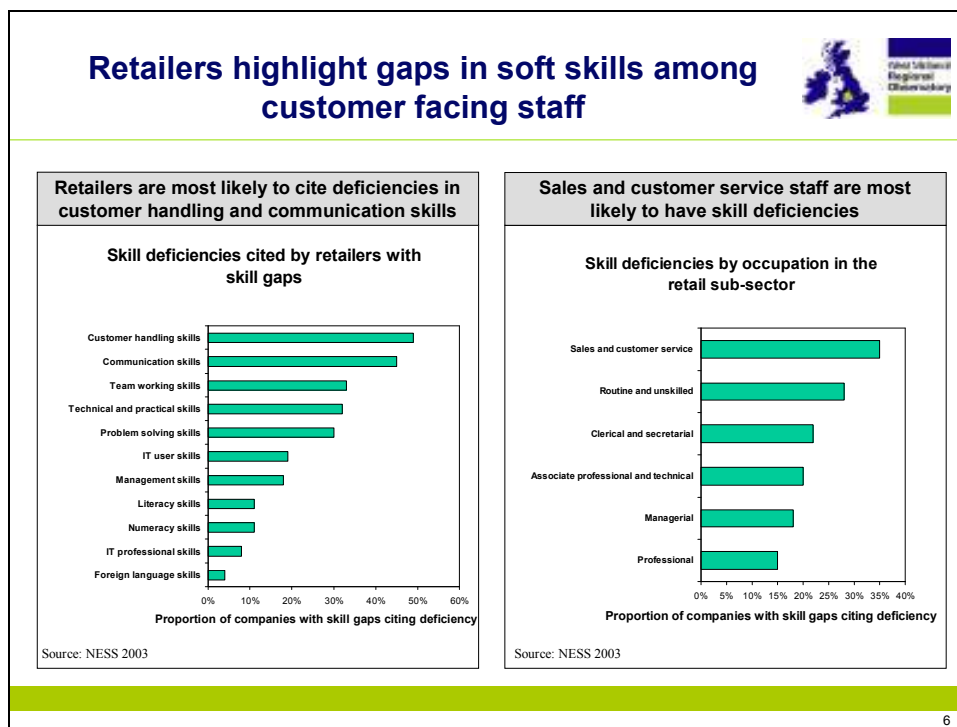
- More than half of sales and customer service staff are qualified to NVQ level 2 or above and a quarter are qualified to NVQ level 3 or above which is close to the national average.
- But managers are less well qualified than in other regions. Only 17% are qualified to NVQ level 4 or above which compares with 22% nationally and just 29% are qualified to NVQ level 3 or above compared with 39% nationally. 45% have low or no qualifications compared with 39% nationally.



6 Internal skill gaps

However, almost a quarter of the Region's retail and distribution companies indicate a gap between the skills of their workforce and those required to develop the business. While deficiencies in both soft skills and more technical skills are highlighted by both retailers and wholesalers:

- In retail a particularly high proportion of companies highlight deficiencies in customer handling skills and among sales and customer service staff.
- In wholesaling a high proportion cite deficiencies in practical/vocational skills and among associate professional and technical staff.

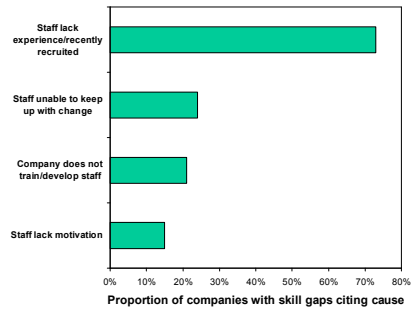


Retailers understand the causes of skill gaps and are taking steps to address them



Skill gaps principally reflect the large numbers of new and inexperienced staff

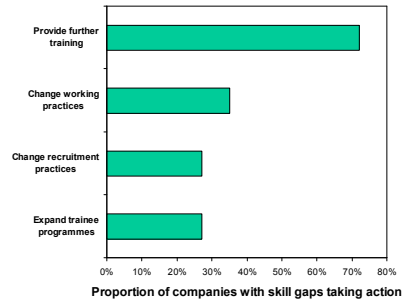
Causes of deficiencies cited by West Midlands retailers with skill gaps



Source: NESS 2003

Retailers are investing in training to address the problem

Remedial action being taken by West Midlands retailers with skill gaps



Source: NESS 2003

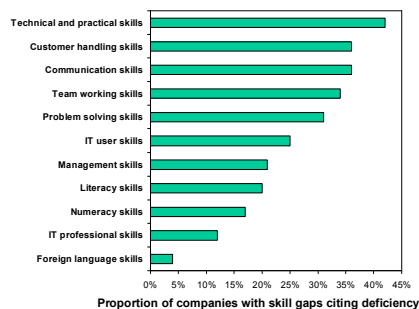
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Wholesalers highlight gaps in practical skills among associate professional & technical staff



Wholesalers are most likely to cite deficiencies in technical and practical skills

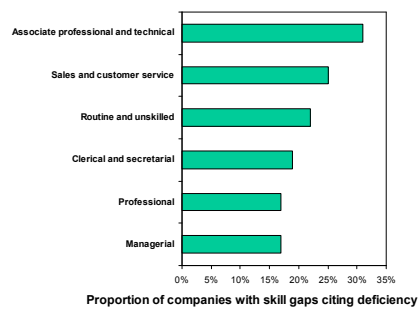
Skill deficiencies cited by wholesalers with skill gaps



Source: NESS 2003

Technical staff are most likely to have skill deficiencies

Skill deficiencies by occupation in the wholesale sub-sector



Source: NESS 2003

8

In the retail sector there is evidence that employers are taking steps to identify and address the root causes of these skill deficiencies:

- Three quarters of West Midlands retailers with skill gaps have identified the large number of new and inexperienced recruits in the sector as a contributory factor.
- Some 70% are responding by providing further training.

7 Recruitment difficulties and skill shortages

The sector is struggling to access the skills required for its further development and growth with more than 40% of retail and distribution companies in the Region with vacancies encountering recruitment difficulties. Some 45% of those companies with recruitment difficulties cite problems in attracting applicants with the skills and experience required. A key issue is whether these skill problems reflect genuine skill shortages in the labour market or simply a lack of interest among potential job applicants. A similar proportion highlight a general lack of interest in working in the sector. Further research¹³ highlights a range of factors that contribute to this lack of interest:

- Many young people, parents, teachers and careers officers have a negative perception of the sector as a potential career choice.
- The sector is characterised by low pay with a mean entry level wage rate of under £6 an hour, shift patterns which do not suit family/childcare needs or match transport provision and a high proportion of temporary/seasonal employment which lacks security. This, along with the flat structures of many organisations, limits opportunities for career progression.
- The sector is often not seen as a viable career option but rather as a temporary stop-gap for employment, or as a source of part time work¹⁴.

It should be noted, however, that in recent years many larger retailers have developed more flexible employment practices and improved personal development opportunities (for more detail see the section on diversity). If the sector's recruitment problems are to be addressed it will be important for this good practice to be adopted by other retailers and to raise awareness of this activity among job seekers.

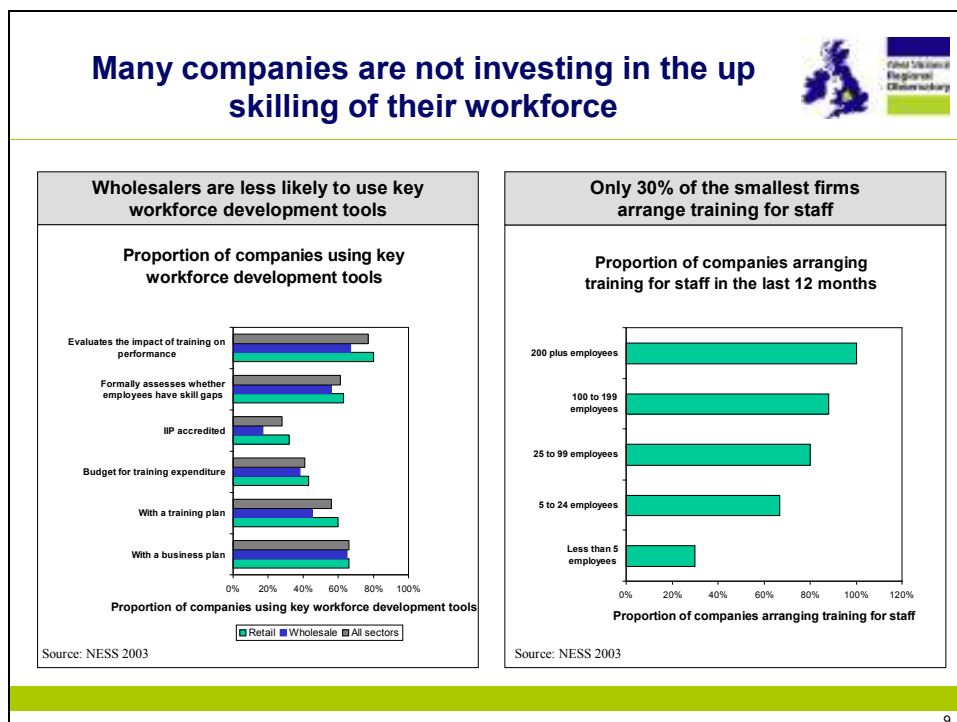
¹³ Retail and Hospitality Skills Research Programme; Retail and Hospitality Skills Task Force, 2003

¹⁴ Improving the provision of work based learning in the retail sector; Pye-Tait; Final Report – Executive Summary

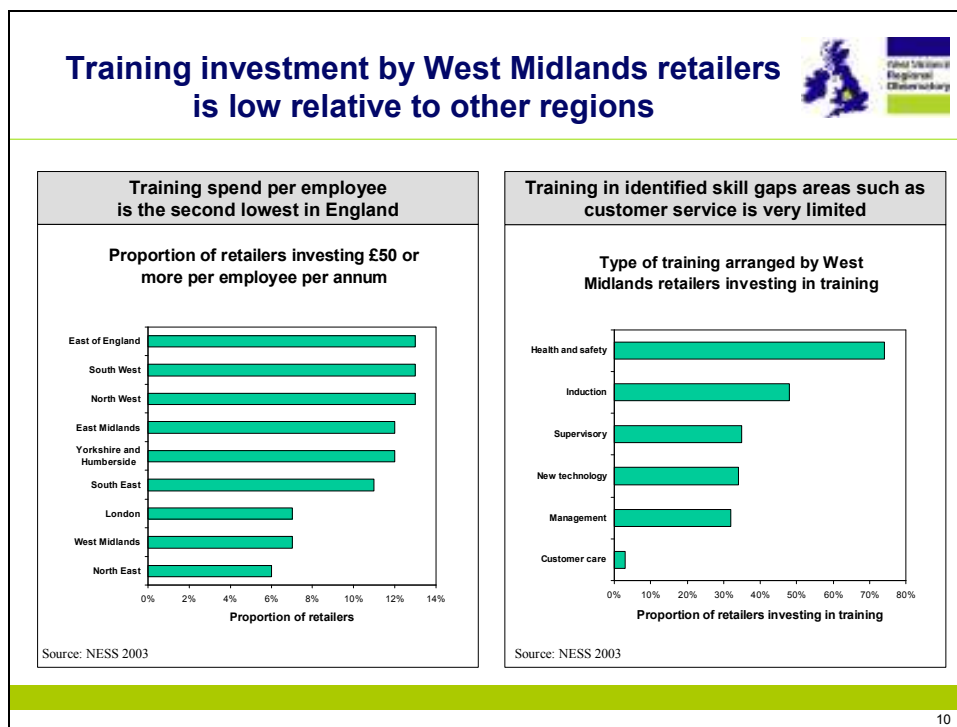
8 Investment in training and workforce development

Given the skill deficiencies identified within the existing workforce and the problems in attracting new recruits into the sector, it is vital that retail and distribution companies look to address the skills problems through training and up-skilling. However, significant numbers of companies are not investing in the development of their staff:

- While the proportion of retailers in the Region with a formal business plan, a specific plan for training, a designated training budget, IIP accreditation and with formal procedures to assess whether employees have skill gaps and to evaluate the impact of training on performance is above the average for all sectors, the proportion of wholesalers using these key workforce development tools is much lower.
- While all larger companies have arranged some form of training for their staff over the last 12 months, only 30% of those employing less than 5 people have done so.



In the retail sector training investment is limited relative to other regions. With just 7% of employers investing £50 or more per employee per annum, training spend per employee is the second lowest in England. Of the training investment taking place only a limited proportion is targeted at identified skill gap areas such as customer service, with the bulk of expenditure on health and safety and induction training.



A range of issues are acting to limit investment in training and workforce development in the sector. While only a relatively small proportion of employers highlight a lack of suitable courses, there are significant problems with the timing and affordability of training. Other factors include¹⁵:

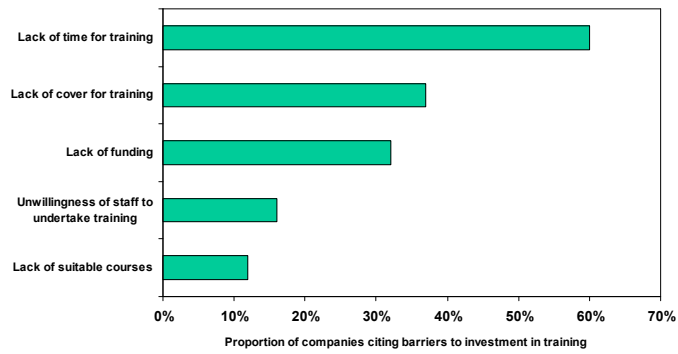
- A lack of appreciation of the value of training, particularly in the critical area of soft skills, at head office level.
- A lack of time available for managers to devote to training and skill development.
- A high proportion of managers that have 'progressed through the ranks' with no formal training who do not, in many cases recognise the value of training.
- Difficulties in specifying the soft skills that are often the key area of deficiency, which are often seen as 'intangible', and the associated training needs.

¹⁵ Retail and Hospitality Skills Research Programme; Retail and Hospitality Skills Task Force, 2003

In retail the principal barriers to training relate to timing and affordability



Barriers to investment in training cited by West Midlands retailers with skill gaps

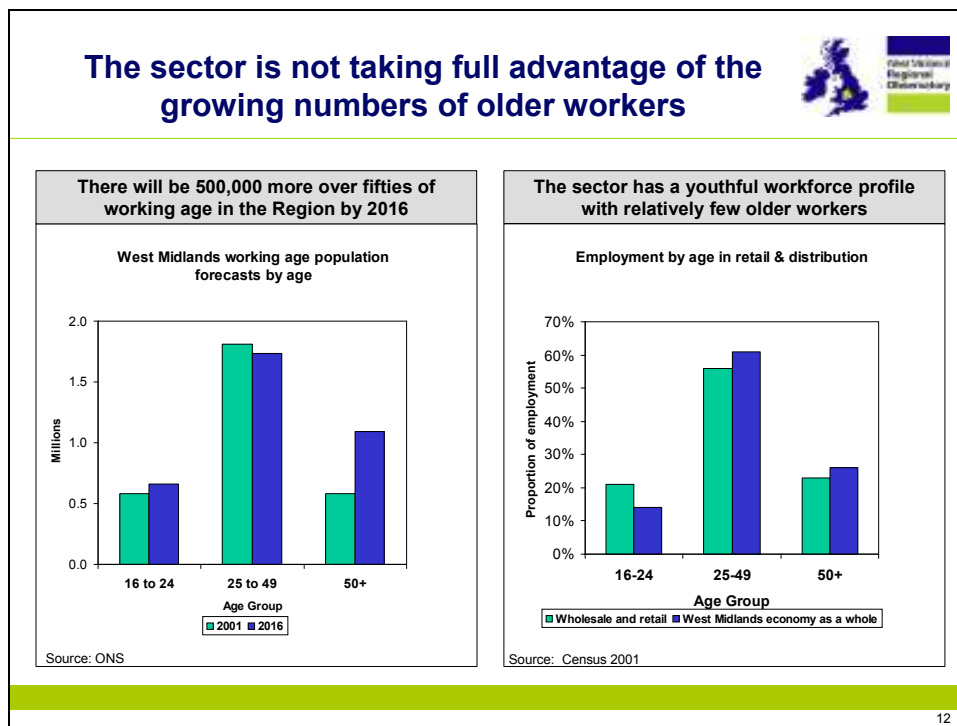


Source: NESS 2003

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9 Mature workforce issues

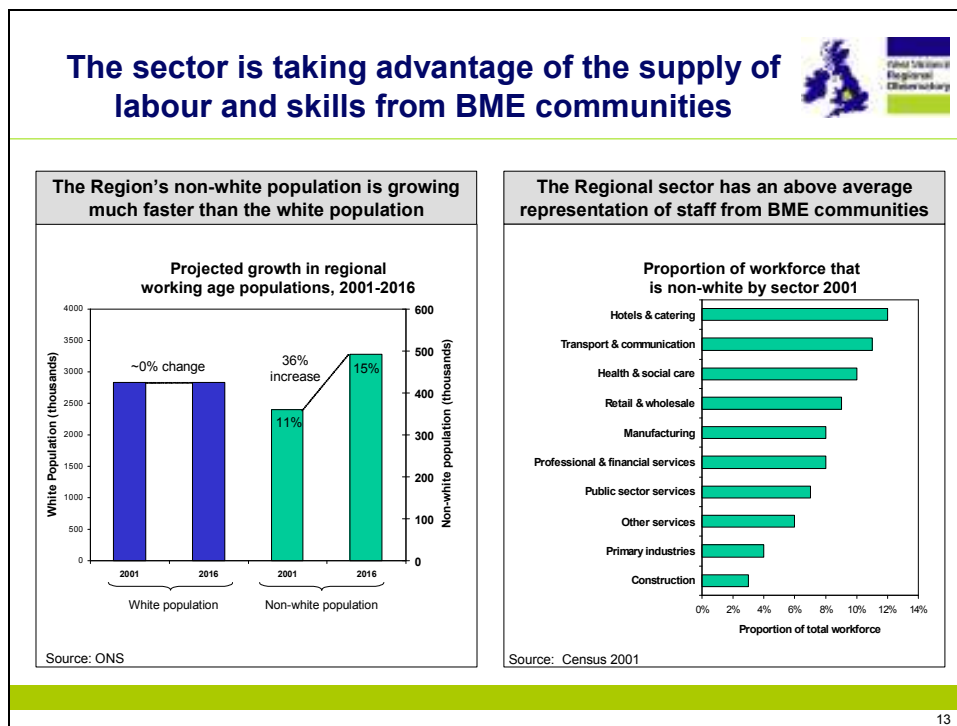
The Region's retail and distribution sector is characterised by a relatively youthful workforce. More than 20% staff are in the 16-24 age group, which compares with 14% across all sectors. However older people are set to account for a growing share of the Region's 'available for work' population in the future. While the number of 16-24 year olds will increase marginally and there will be a fall in the number of 25-49 year olds by 2016, the number of people of working age over 50 will increase dramatically by 500,000 to 1 million. If employers are to successfully meet their future labour and skills needs they will need to exploit the potential of this group.



A number of major employers in the sector are making considerable efforts to attract older workers, valuing their maturity and experience of household and family needs. For example, ASDA is actively targeting older workers in its recruitment and employs over 20,000 workers aged 50 or over (19 per cent of their workforce), making the company the UK's biggest employer of the over 50s. It will be important for other employers to adopt similar good practice.

10 Diversity

Ethnic minority communities represent a significant and growing source of labour and skills for West Midlands businesses and retail and distribution companies are beginning to take advantage of this. Ethnic minority communities account for 9% of employment in the Region's retail & distribution sector, which is a higher proportion than in many other sectors.

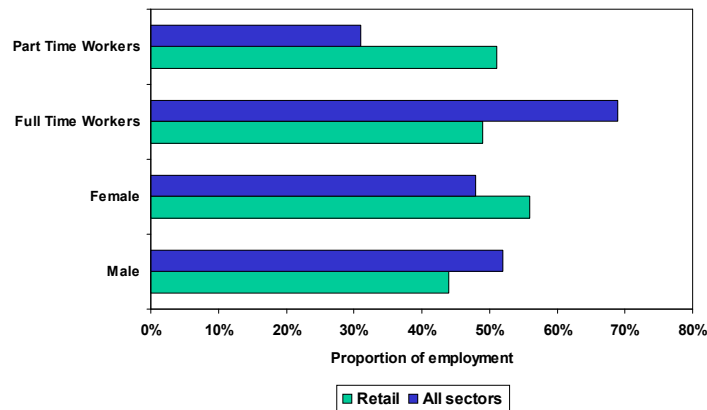


The retail sub-sector also employs an above average proportion of women and part time staff and is increasingly offering employment opportunities to marginal workers who traditionally face difficulties entering the labour market. This is often done in order to attract sufficient workers to enable expansion and to cope with high levels of staff turnover.

The Region's retailers employ large numbers of women and part time workers



Structure of Regional retail employment by gender and status



Source: ABI 2003

14

These pressures, coupled with more stringent legislation, has led many retailers in the West Midlands to make a virtue out of necessity and engage a workforce that has above average requirements for basic skills and special needs associated with long-term unemployment. Many employ significant numbers of people with low or no qualifications who can demonstrate a positive customer focus and attitude to work. Retail employment offers a route back to the labour force from unemployment and inactivity and the chance to develop employability skills. As well as an opportunity, this trend represents a considerable training and management challenge for the industry¹⁶:

- B&Q supports the government's WORKSTEP scheme, aimed at enabling individuals with disabilities to engage in mainstream employment and provide a support network in order to help workers with disabilities reach their full potential. The success of the programme has seen the company's employment of workers with disabilities treble over the last three years.
- In order to meet the labour demand associated with the opening of its new Birmingham store in 2001, GAP Birmingham enlisted the aid of Jobcentre Plus. The project aimed to attract disadvantaged workers from the local area into employment at the store. Four-week training courses were provided for individuals on the New Deal programme, including older workers, lone parents and the long-term unemployed. Ten out of the 12 individuals enrolled on the scheme accessed employment in the store and all remain in GAP

¹⁶ Retail Labour Markets and Displacement Activity Across the West Midlands Region, Experian, June 2004

employment. The store also recruited eight disabled workers, some suffering severe disability.

- Marks & Spencer's 'Marks and Start' programme was launched in February 2004, potentially offering up to 10,000 work experience placements over the next three years, targeted at those who may face barriers to employment. The work experience placements last between two and four weeks and offer the opportunity to work in M&S stores and offices to school children, people with disabilities, parents returning to work, the young unemployed, the homeless and students who are the first in their family to aim for higher education.
- In 2002 ASDA won the Castle Award for promoting equal pay and opportunities for women. Initiatives include store manager job sharing, childcare leave, shift swapping and 'school starter' schemes, which are centred around operating flexible working practices to encourage female participation and facilitate progression to more senior roles. The company is actively targeting older workers in its recruitment and employs over 20,000 workers aged 50 or over (19 per cent of their workforce), making the company the UK's biggest employer of the over 50s. It will be important for other employers to adopt similar good practice.
- Tesco established the 'Tesco Regeneration Partnership Programme' in 1999. Initiatives are targeted at the long-term unemployed (as identified by Jobcentre Plus) with potential employees selected on attitude and aptitude rather than qualifications. All those selected are then enrolled on the 'Job Guarantee Scheme', which provides eight weeks of basic training with the guarantee of a job on successful completion. The security this offers attracted an above average proportion of older males, increasing diversity in a typically young and female workforce.

11 References

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