

“one **industry**  
one **voice**”

# Builders Merchant Building Index



Monthly report for July 2017

# Building the Industry & Building Brands from Knowledge



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Quarterly reports contain additional analysis, macro-economic factors and expert comments. Click the images below to read or download the Q2 report.



**Monthly and Quarterly Indices**  
June 2017 and Q2 2017

**Landscaping - Quarterly**

**Macro factors impacting Merchants**

**GfK Insights**  
Product group insights at feature by brand level are available. Enabling informed strategic and tactical decision making.

- Total Dispersible products make up 4.6% of total GfK sales
- Paint & Woodwork is 31% of all Dispersible
- Total Paint category is worth £12.1m
- Emulsion Paint is 65% of Total Paint, £7.8m
- White

**Consumer Confidence Index**

**Expert Panel**  
PVC-U Windows & Doors  
(Part of Timber & Joinery Products)

**Steve Halford, Group Managing Director Crystal Direct is BMBI's Expert for PVC-U Windows & Doors.**

Quarter-on-quarter enquiries are down for the first time in three years but this could be due to more builders' merchants pricing online. Compared with Quarter 2 2016, the market for bespoke PVC-U windows and doors remains stable and is up quarter-on-quarter and year-on-year by 9% and 40% respectively.

Conversion rates continue to improve too as more merchants recognise the benefits of selling bespoke windows. It's a reliable £10 billion a year market and merchants have a lot to be optimistic about.

The challenge for merchants is changing the way they sell. As consumers, most builders, installers and private developers go online to look at what's available and increasingly order online. Skills makers like Amazon and others have made it so easy, quick and convenient that we now expect it all the time, in business and personal life, and since you get used to it, it's frustrating to stop back in time to slow, less convenient way of doing things.

Merchants who sell PVC-U windows with bespoke and online configurations will reach more, and more profitably than those who don't. They've seen the potential, and are changing how they sell. Showrooms make it easier for merchants to engage with their builder and contractor customers. They're especially effective with high value home improvement products such as kitchens and bathrooms, and create more engaging customer experiences for quality PVC-U windows and doors too.

It's important that merchants and suppliers continue working together to deliver an omnichannel approach to marketing high-level home improvement products. Smart customers go online first for their buying, research content and their preferred product solution. But then, ready to buy, merchants need to follow through at branch level with knowledgeable staff and strong representation of the product, backed by excellent on-line performance.

Bespoke PVC-U windows and doors have opened up a big, new market for merchants. But unless merchants put more resource and effort into showcasing bespoke, omnichannel marketing that combines online with showrooms and in-branch initiatives, many merchant markets will be vulnerable to new entrants from e-commerce. Combining the best attributes of both online and technology, in both 'real' and 'virtual' environments is the way forward.

**"The challenge for merchants is changing the way they sell."**

# Introduction



This Builders Merchant Building Index (BMBI) report contains data from GfK's ground-breaking Builders Merchants Panel, which analyses data from over 80% of generalist builders' merchants' sales throughout Great Britain. GfK's Builders Merchant Point of Sale Tracking Data sets a gold standard in reliable market trends. Unlike data from sources based on estimates, or sales from suppliers to the supply chain, this up-to-date data is based on actual sales from merchants to builders and other trades.

BMBI trend data is indexed on the 12 month period July 2014 to June 2015. The monthly series tracks what is happening in the market month by month and includes an in-depth review every quarter. This trend series gives the industry access to far more accurate and comprehensive insights than that available to other construction sectors.

MRA Marketing produces the Builders Merchant Building Index, a brand of the BMF, to communicate to the wider market as the voice of the industry as well as the voice of individual Expert Brands: Crystal Direct, Keylite Roof Windows, Timbmet, Alumasc Water Management Solutions, Hanson Cement, IKO PLC, Keystone Lintels, Knauf Insulation, Encon Insulation, Ibstock, Natural Paving Products and Heatrae Sadia, who provide valuable commentary on market trends and influences.

## **More data available**

This BMBI report provides valuable top-level indices but there's considerably more data available. GfK insights go much deeper and include sales value data. GfK can quantify market values and drill down into contributing categories, tracing product group performance, to focus on aspects that are critical to you.

GfK can also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join to submit their monthly sales-out data the quality of this information can only become more extensive and rigorous. Merchants or suppliers who are interested in acquiring data or getting involved should contact Richard Frankcom at [richard.frankcom@gfk.com](mailto:richard.frankcom@gfk.com).

The BMBI website enables you to compare Landscaping trends with Heavy Building Materials, or Kitchens with Timber on our interactive charts.

Download current and past reports, read the news or search through comments or blogs at [www.bmbi.co.uk](http://www.bmbi.co.uk). Follow us and the Experts [@theBMBI](https://twitter.com/theBMBI).

# Overview

## A stronger July for merchants

### Year on year

Total Builders Merchant value sales were up 7.0% in July 2017 compared with July last year, on an identical number of trading days. Ironmongery (+13.1%) saw the greatest increase, with Kitchens & Bathrooms (+11.4%), and Tools (+8.0%) amongst five categories doing better than merchants generally. Only two categories sold less, including Workwear & Safetywear (-3.4%).

### Month on month

With one less trading day than June, July was 0.9% lower than the previous month. Four of the twelve categories sold more, including Decorating (+2.5%).

Average sales per day in July were 3.9% ahead of June and most categories achieved higher daily sales, including Timber & Joinery Products (+4.4%) and Heavy Building Materials (+4.3%).

### Other periods

Year to date sales strengthened, with the first seven months of 2017 4.3% ahead of the same period in 2016 – up from +3.8% YTD in June.

The rolling 12 month period, August 2016 to July 2017, was 5.2% ahead of the same period a year earlier, helped by two additional trading days. Landscaping (+7.5%) had the best 12-month performance, with Ironmongery (+7.3%) close behind. Average sales per day over the period were 4.3% up.

### Index

July's Builders Merchant Building Index was 119.2 (117.8 adjusted for trading days) and all categories except two had indices over 100. Strongly seasonal Landscaping (140.8) was the top performer.

For additional, deeper category insights and detailed benchmarking please contact Richard Frankcom at GfK.

Year to date sales strengthened, with the first seven months of 2017 4.3% ahead of the same period in 2016 – up from +3.8% YTD in June.

# The Expert Panel

## Speaking for their markets



The Builders Merchant Building Index (BMBI) includes a growing panel of industry Experts. In each quarterly report they comment on the market, with a particular focus on the story behind the trends. Experts are leading brands, or brands aspiring to become leaders, who are the voice of their markets.

The Q2 2017 report, which includes commentary from our experts is available [here](#)

### Meet the Builders Merchant Building Index Experts:

**Steve Halford**, Group Managing Director, Crystal Direct is BMBI's Expert for PVCU Windows & Doors



**Andrew Simpson**, National Commercial Director, Hanson Cement is BMBI's Expert for Cement & Aggregates



**Mike Beard**, Merchant Development Director, Encon Insulation is BMBI's Expert for Insulation Products - Distribution



**John Duffin**, Managing Director, Keylite Roof Windows is BMBI's Expert for Roof Windows



**Andy Williamson**, Group Managing Director, IKO PLC is BMBI's Expert for Roofing Products



**Tony France**, Sales Director, Ibstock is BMBI's Expert for Bricks



**Nigel Cox**, Managing Director, Timbmet is BMBI's Expert for Timber & Panel Products



**Derrick McFarland**, Managing Director, Keystone Lintels is BMBI's Expert for Steel Lintels



**Paul Rivett**, Managing Director, Heatrae Sadia is BMBI's Expert for Water Heating



**Steve Durdant-Hollamby**, Managing Director, AWMS is BMBI's Expert for Civils, Metal Rainwater & Drainage



**John Sinfield**, Managing Director, Knauf Insulation is BMBI's Expert for Mineral Wool Insulation



**Malcolm Gough**, Group Sales & Marketing Director, Natural Paving Products is BMBI's Expert for Natural Stone, Vitrified Paving & Artificial Grass



# Monthly: Index and Categories

## July 2016\* – July 2017

(Indexed on monthly average, July 2014 – June 2015)



		2016						2017						
VALUE EX VAT £	Index	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July
<b>Total Builders Merchants</b>	<b>100</b>	<b>111.1</b>	<b>113.7</b>	<b>113.8</b>	<b>112.3</b>	<b>113.6</b>	<b>77.1</b>	<b>94.7</b>	<b>100.5</b>	<b>122.8</b>	<b>106.7</b>	<b>121.1</b>	<b>120.2</b>	<b>119.2</b>
Timber & Joinery Products	100	107.8	112.2	113.3	112.8	113.7	76.1	99.1	100.9	121.2	102.9	117.1	116.7	116.3
Heavy Building Materials	100	111.9	114.4	114.6	113.4	114.1	77.0	94.0	100.1	123.0	106.9	122.5	121.2	120.6
Decorating	100	107.8	112.5	109.8	108.3	110.4	76.3	92.8	97.0	115.6	98.8	111.0	111.8	114.6
Tools	100	101.5	102.4	104.6	106.5	111.3	74.8	97.6	101.7	120.7	97.2	107.0	109.9	109.8
Workwear & Safetywear	100	98.5	98.6	101.0	110.9	133.2	72.6	109.5	102.7	114.1	85.1	101.4	99.4	95.2
Ironmongery	100	111.0	115.8	119.8	118.0	119.9	84.6	107.5	109.4	129.2	107.5	121.6	124.5	125.6
Landscaping	100	132.0	129.2	119.9	110.2	97.2	62.4	71.0	87.7	129.5	138.1	153.1	146.9	140.8
Plumbing, Heating & Electrical	100	100.5	103.6	111.7	116.0	132.4	94.0	114.9	116.1	128.7	98.3	109.7	110.0	106.6
Renewables & Water Saving	100	63.7	63.1	72.8	61.2	73.4	42.4	68.1	76.2	90.3	68.2	70.2	69.9	66.6
Kitchens & Bathrooms	100	101.7	105.3	111.4	109.4	121.7	83.8	98.1	110.2	123.6	99.3	111.3	118.3	113.7
Miscellaneous	100	115.3	114.5	115.7	113.6	122.2	92.6	113.2	108.8	124.4	103.4	120.5	113.7	117.2
Services	100	115.5	115.2	111.1	108.3	107.1	81.3	87.8	95.0	115.0	100.6	112.4	109.7	110.6

\*Click the web link below to see the complete series of indices from July 2015.

Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2017

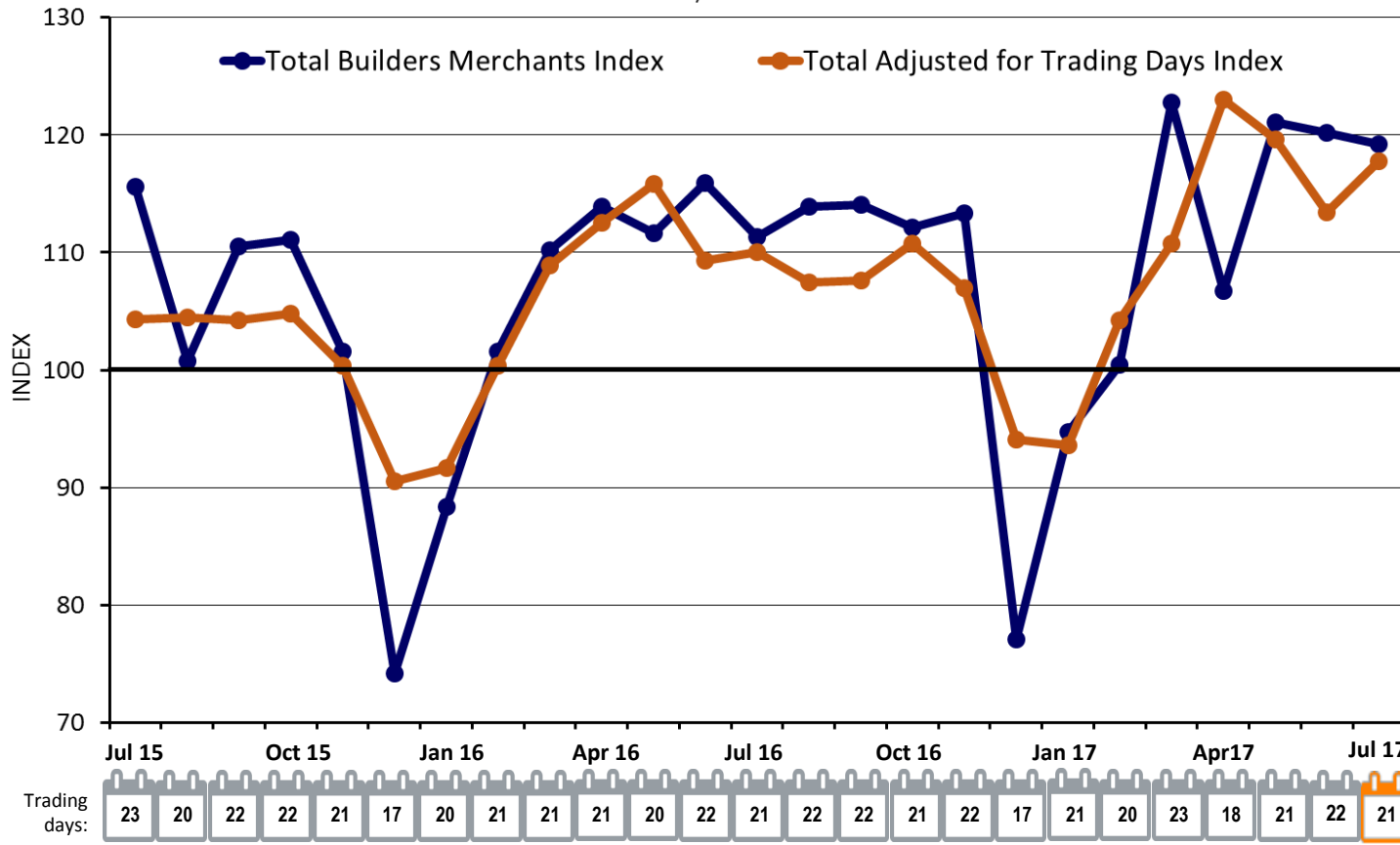


# Monthly: Index

## Adjusted and unadjusted for trading days

### Total Builders Merchants Index v Total Adjusted for Trading Days Index

Indexed on July 2014 - June 2015



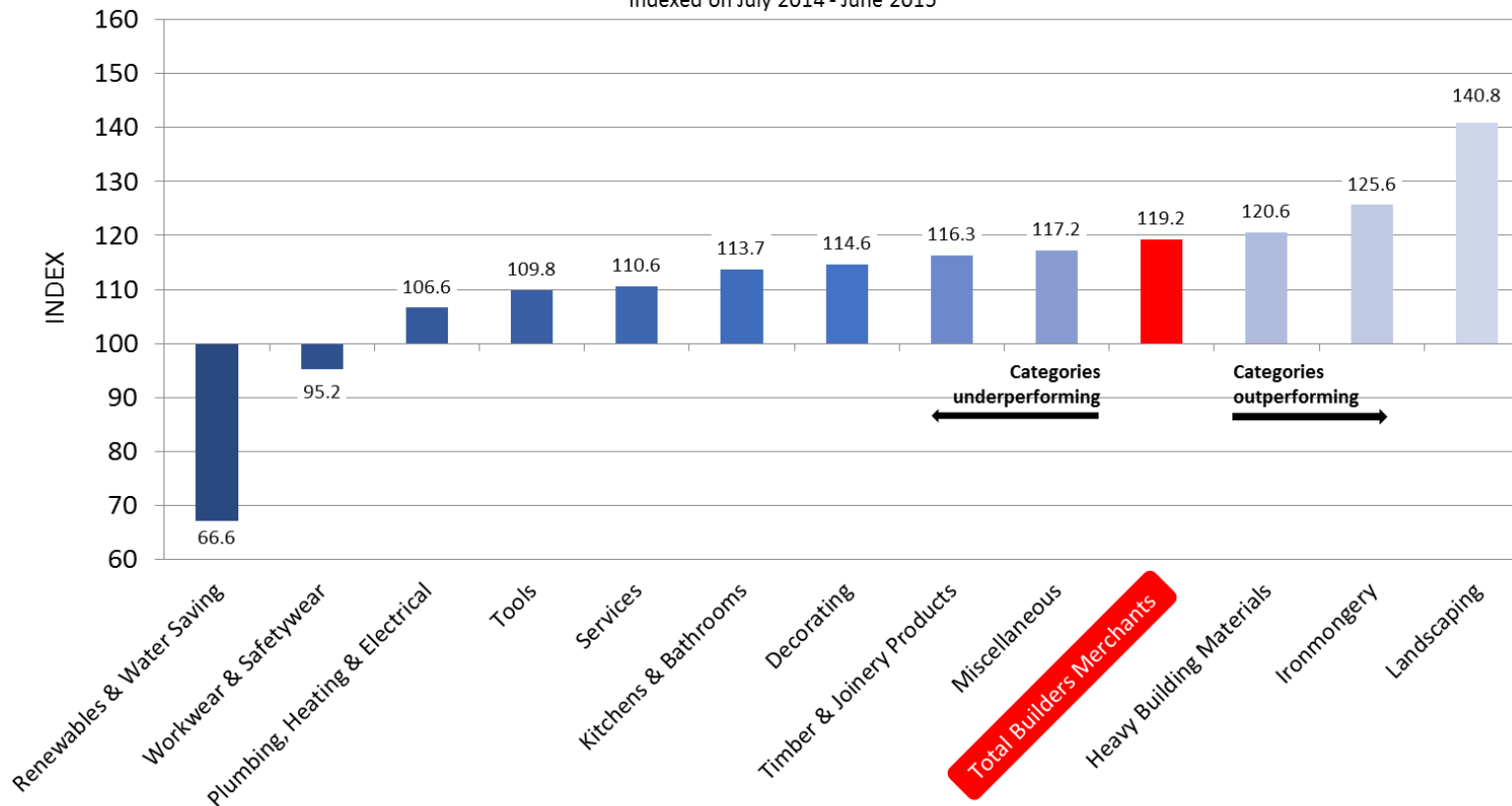
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2017

# Monthly: Index and Categories

## July 2017 index

### July 2017 Index

Indexed on July 2014 - June 2015

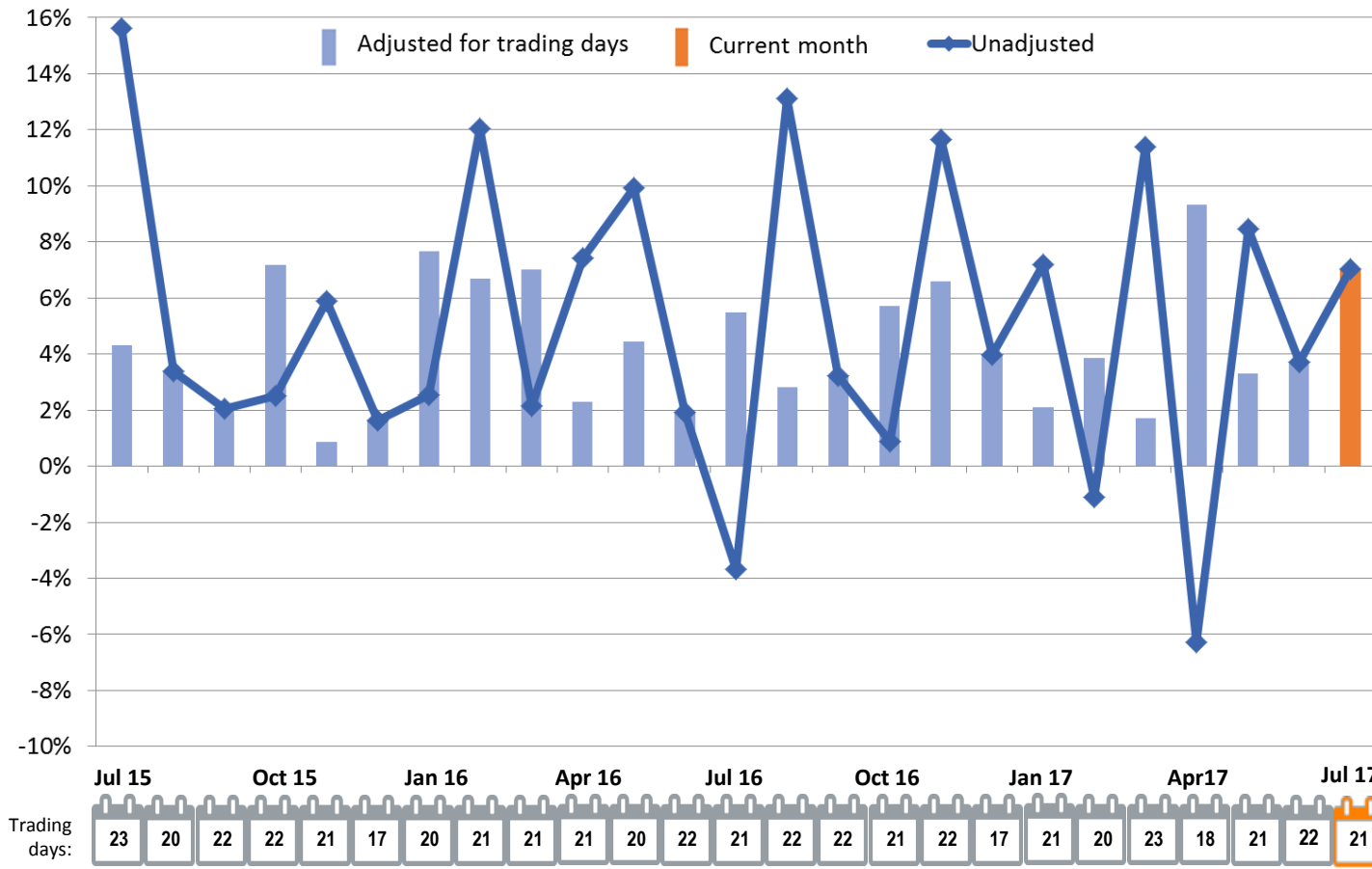


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2017

# Monthly: Sales Indices

## Adjusted and unadjusted for trading days

### Monthly: Year on Year

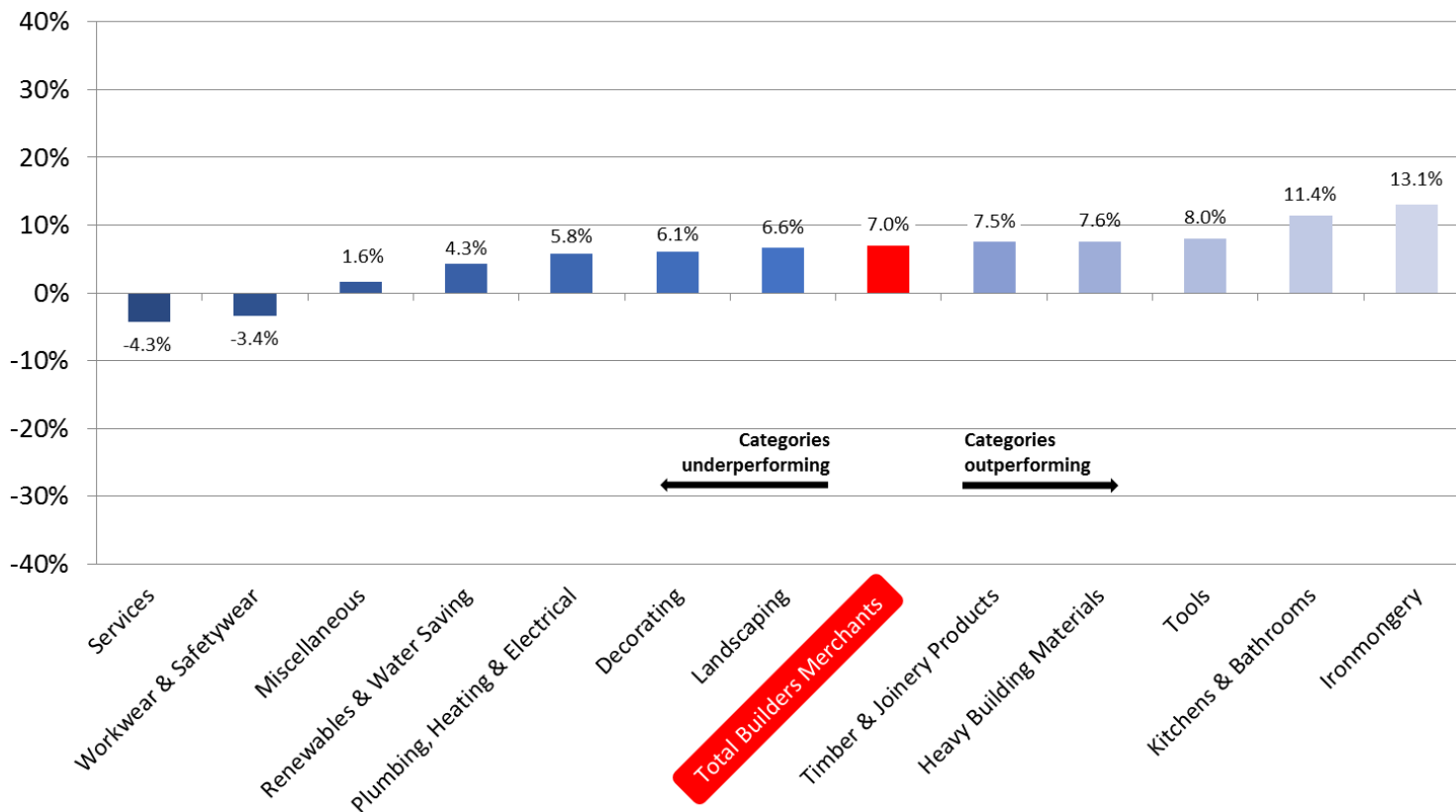


Source: GfK's Builders Merchants Total Category Report July 2015 to July 2017

# Monthly: this year v last year

## July 2017 sales indices

### July 2017 index v July 2016 index

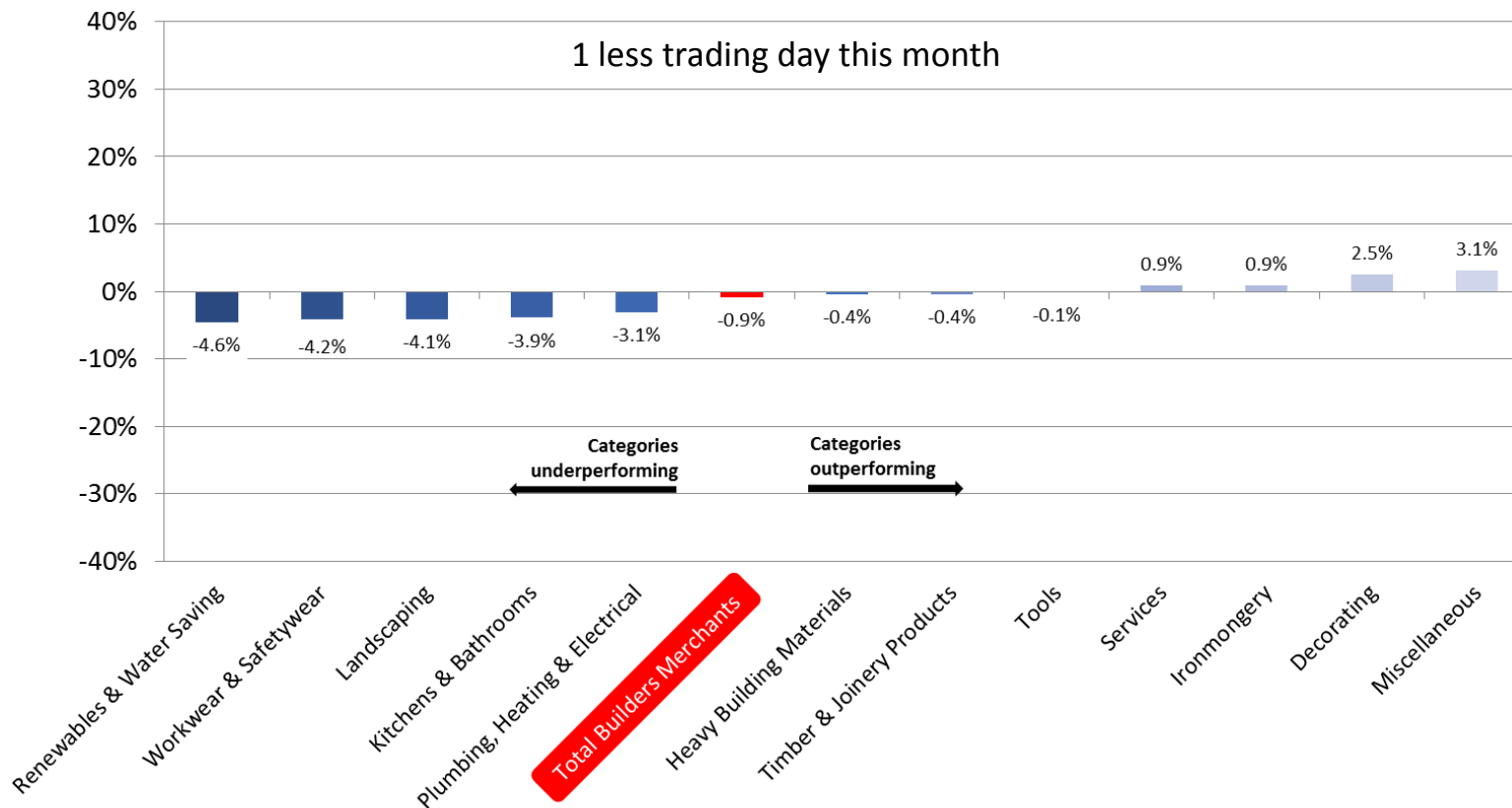


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2017

# Monthly: this month v last month

## July 2017 sales indices

### July 2017 index v June 2017 index

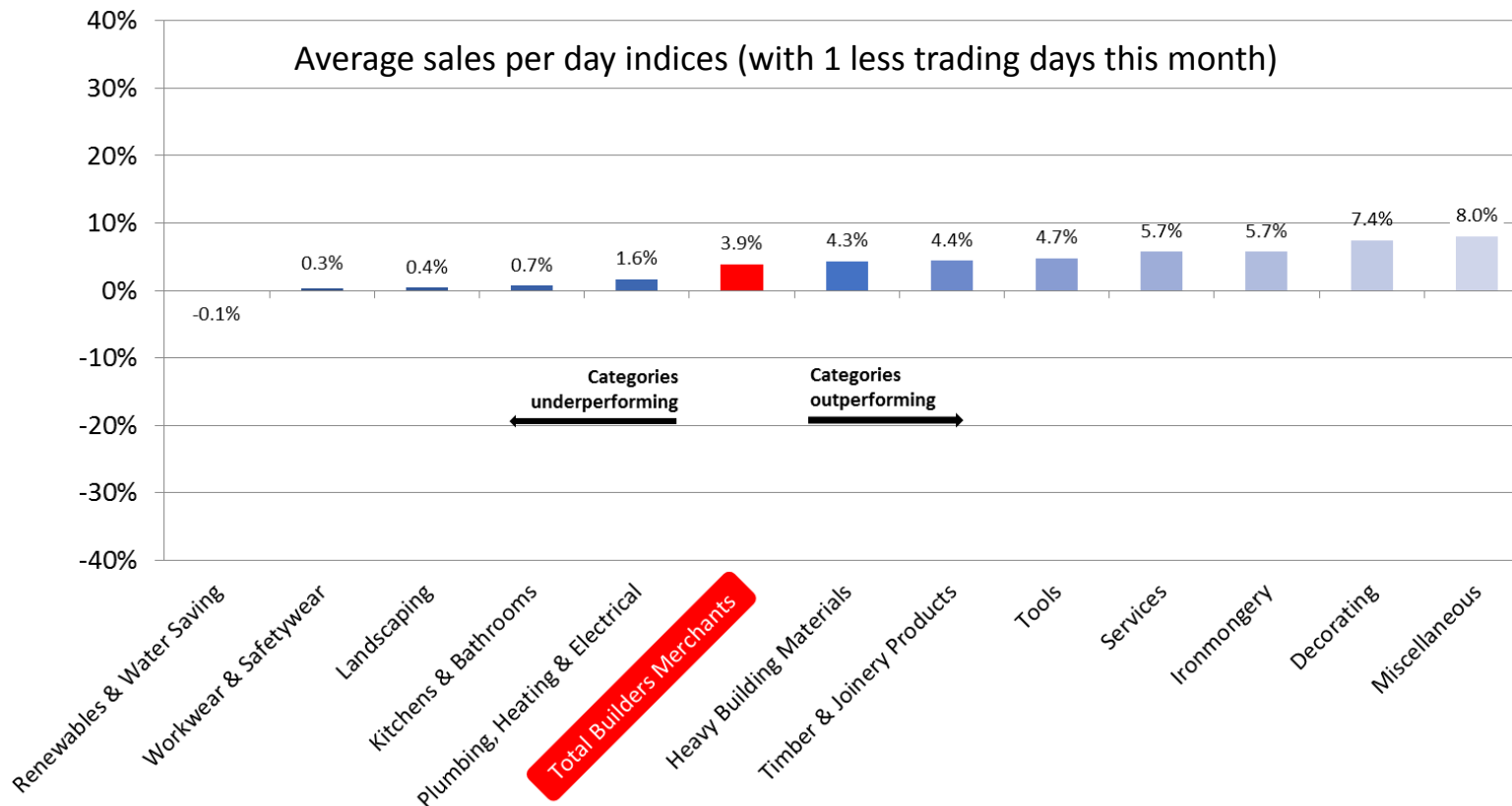


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2017

# Monthly: this month v last month

## July 2017 average sales per day indices

### July 2017 index v June 2017 index



 Source: GfK's Builders Merchants Total Category Report July 2015 to July 2017

# Quarterly: Index and Categories

## Quarter 2 2016\* to Quarter 2 2017

(Indexed on July 2014 to June 2015)



VALUE EX VAT £	Index	Q2, 2016	Q3, 2016	Q4, 2016	Q1, 2017	Q2, 2017
<b>Total Builders Merchants</b>	<b>100</b>	<b>113.6</b>	<b>112.9</b>	<b>100.9</b>	<b>106.0</b>	<b>116.0</b>
Timber & Joinery Products	100	109.0	111.1	100.7	107.1	112.3
Heavy Building Materials	100	114.1	113.6	101.4	105.7	116.9
Decorating	100	107.0	110.0	98.2	101.8	107.2
Tools	100	103.5	102.8	97.3	106.7	104.7
Workwear & Safetywear	100	100.1	99.4	105.5	108.8	95.3
Ironmongery	100	112.2	115.5	107.4	115.3	117.9
Landscaping	100	142.2	127.0	89.8	96.1	146.0
Plumbing, Heating & Electrical	100	105.2	105.3	113.9	119.9	106.0
Renewables & Water Saving	100	69.1	66.5	59.0	78.2	69.4
Kitchens & Bathrooms	100	104.1	106.1	104.7	110.6	109.6
Miscellaneous	100	111.3	115.1	109.4	115.5	112.5
Services	100	114.7	113.9	98.9	99.3	107.6

\*Click the web link below to see the complete series of quarterly indices from September 2015.

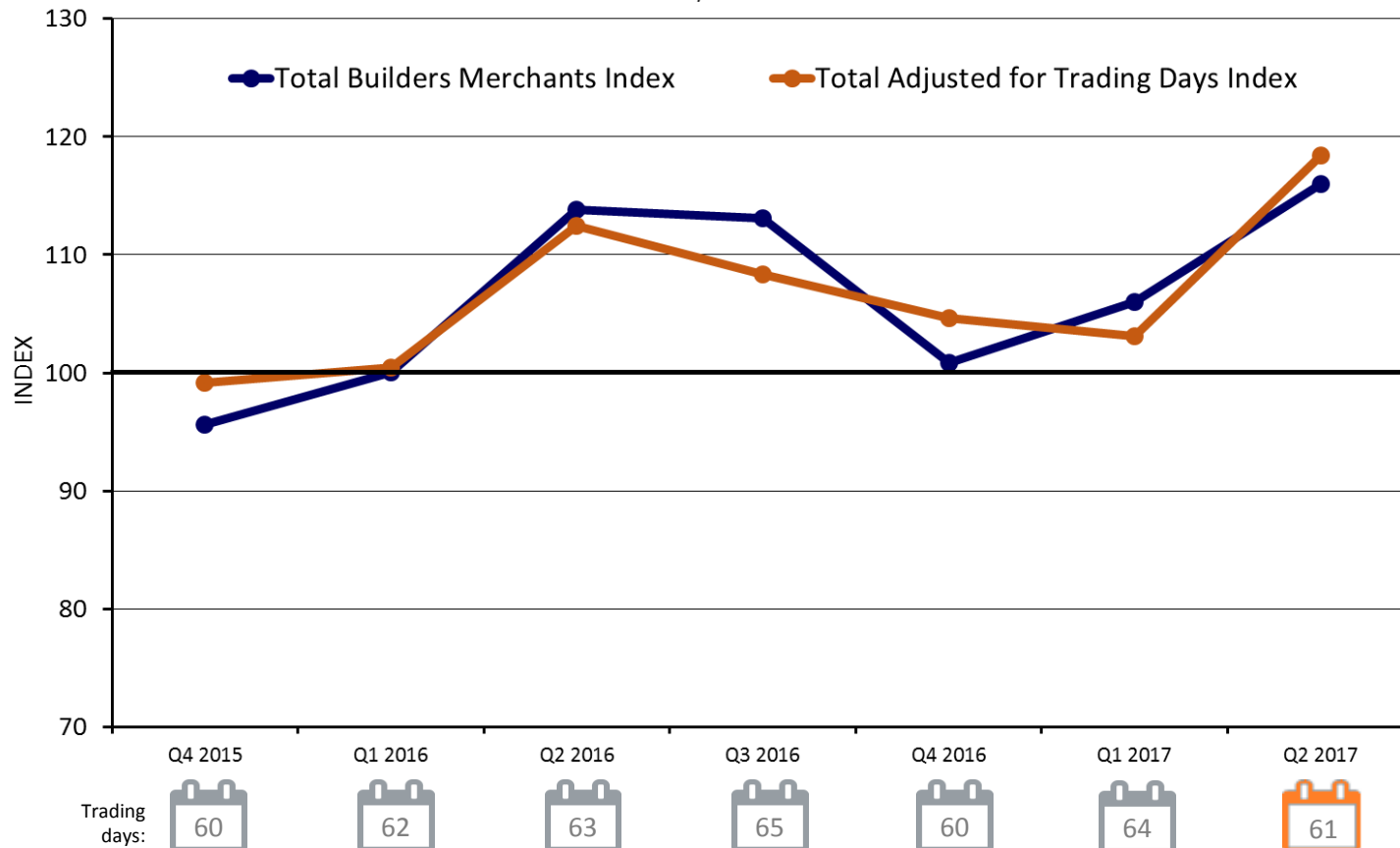
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2017

# Quarterly: Index

## Adjusted and unadjusted for trading days

### Total Builders Merchants Index v Total Adjusted for Trading Days Index

Indexed on July 2014 - June 2015



 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2017

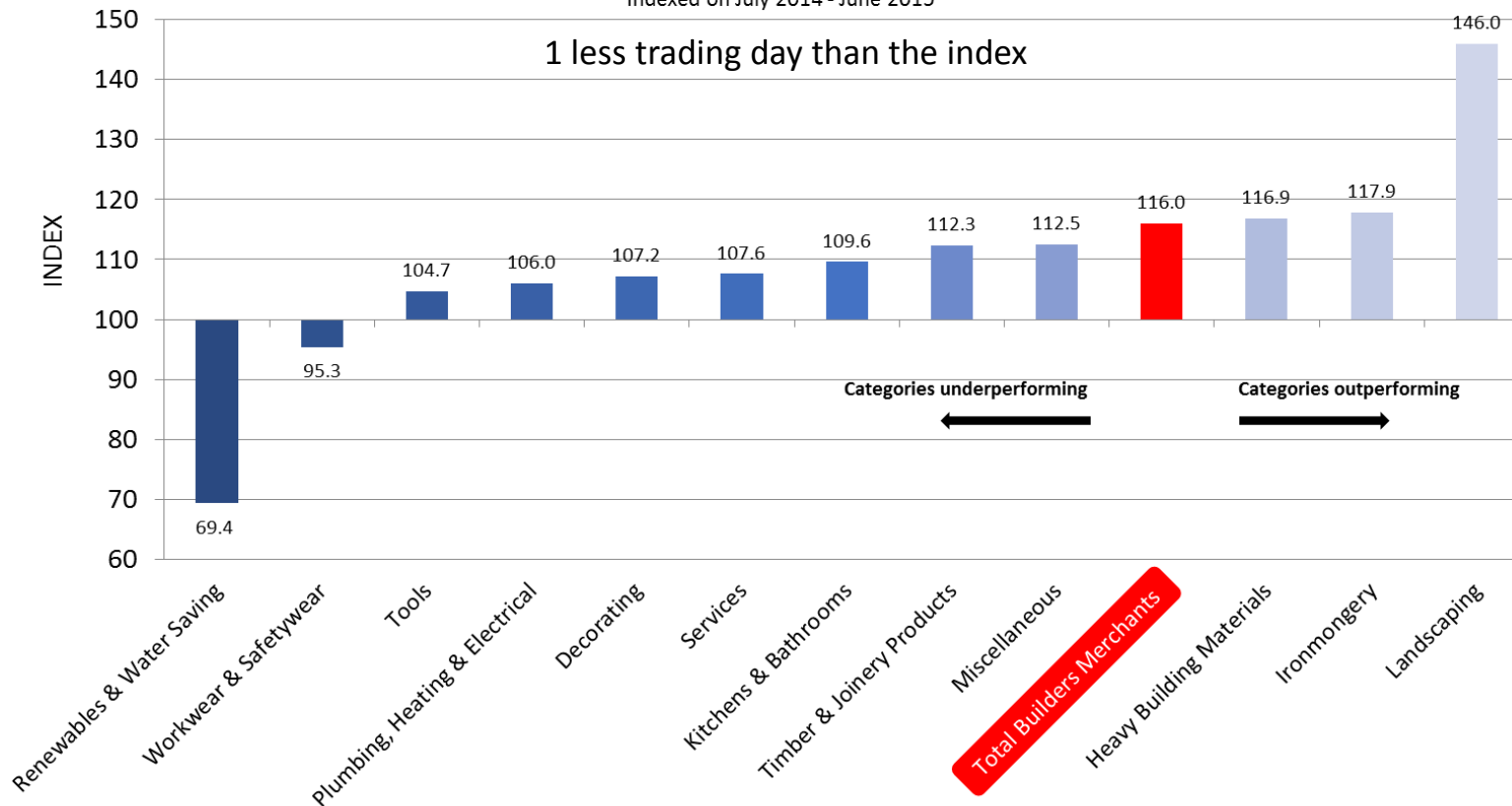


# Quarterly: Index and Categories

## Q2 2017 index

### Quarter 2 2017

Indexed on July 2014 - June 2015



 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2017

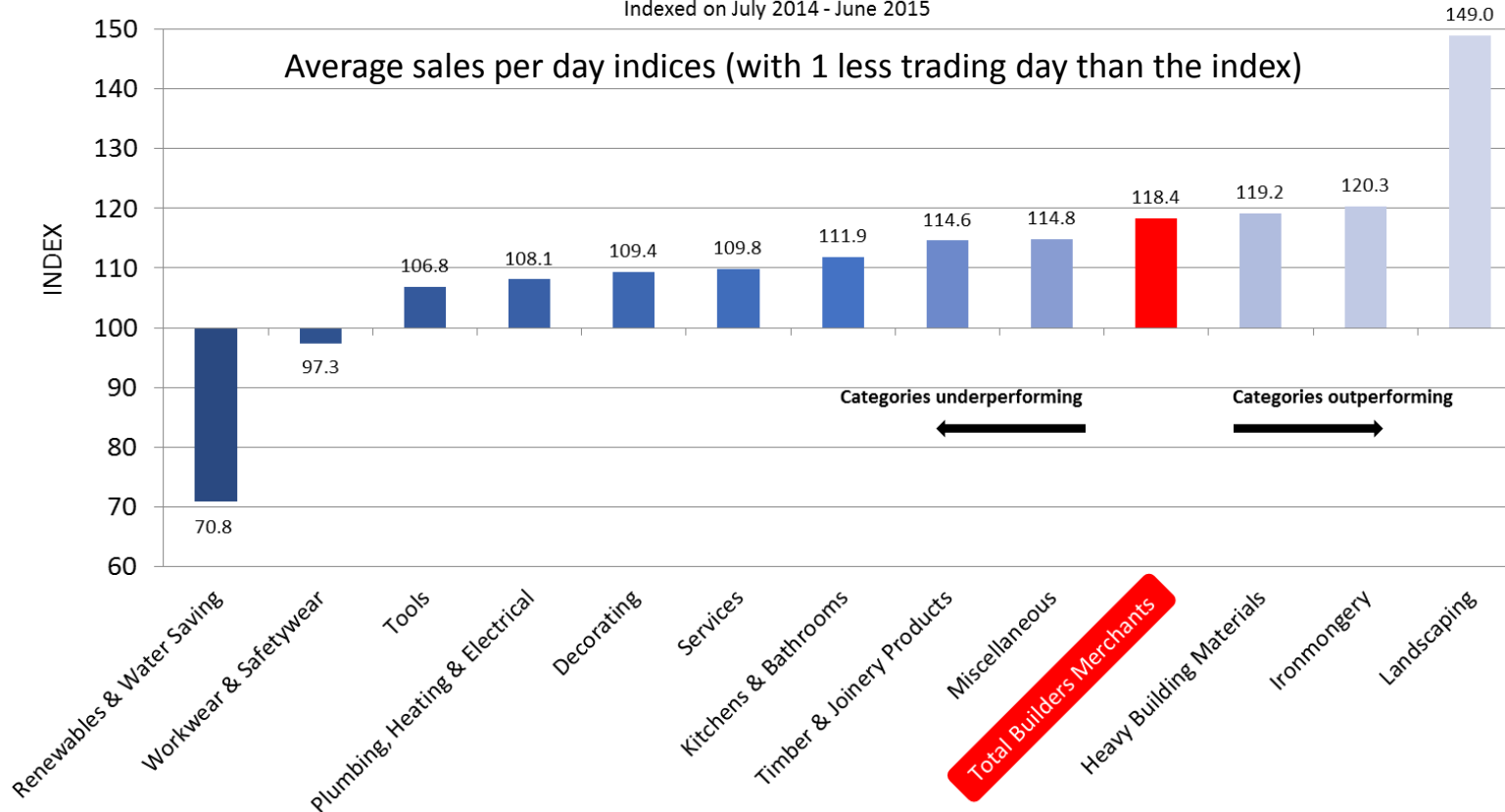
# Quarterly: Index and Categories

## Q2 2017 index

### average sales per day

## Quarter 2 2017

Indexed on July 2014 - June 2015



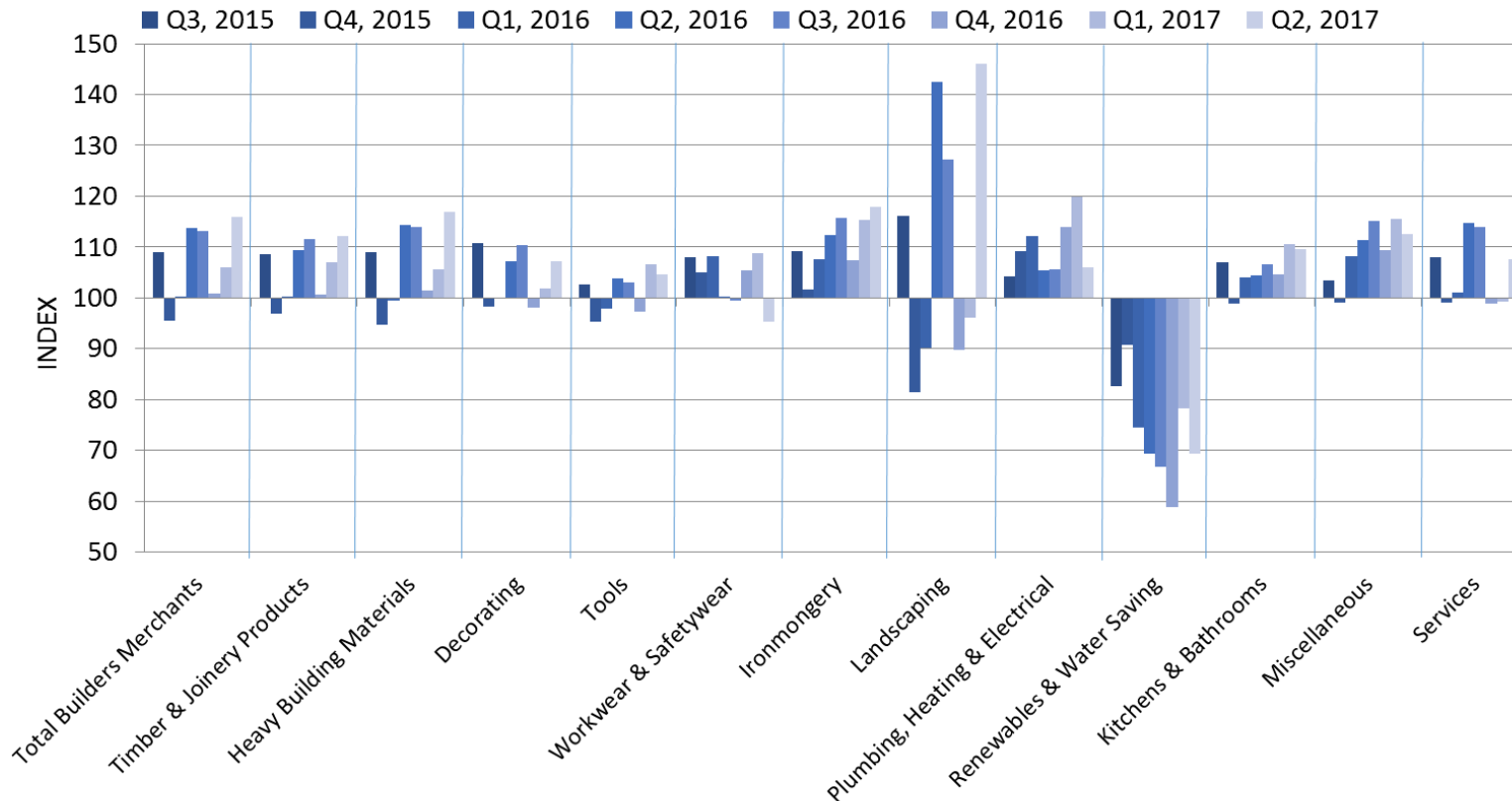
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2017

# Quarterly: Index and Categories

## Quarterly indices

### Quarterly Indices

Indexed on July 2014 to June 2015

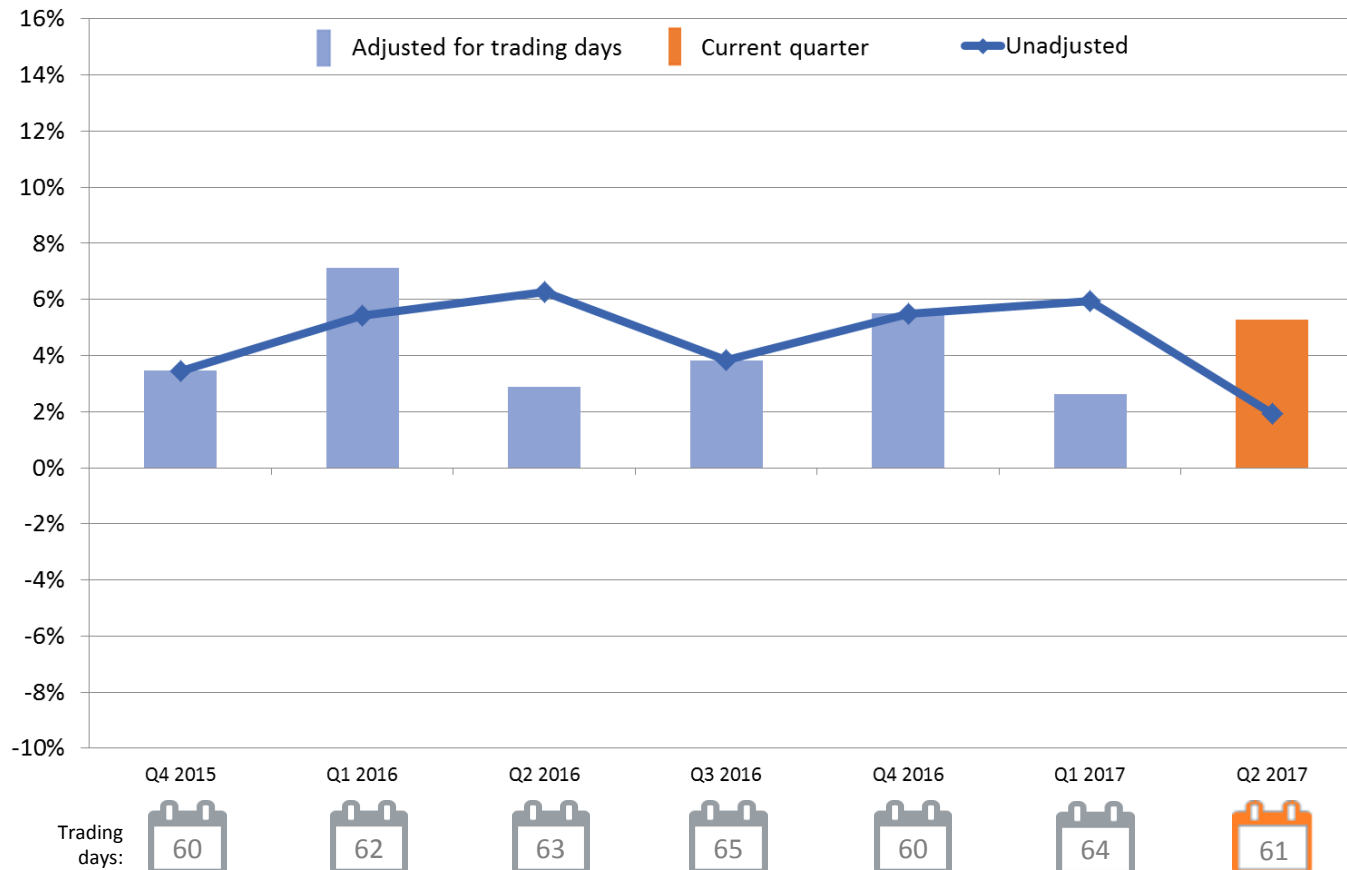


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2017

# Quarterly: Sales Indices

## Adjusted and unadjusted for trading days

### Quarterly Indices: Year on Year

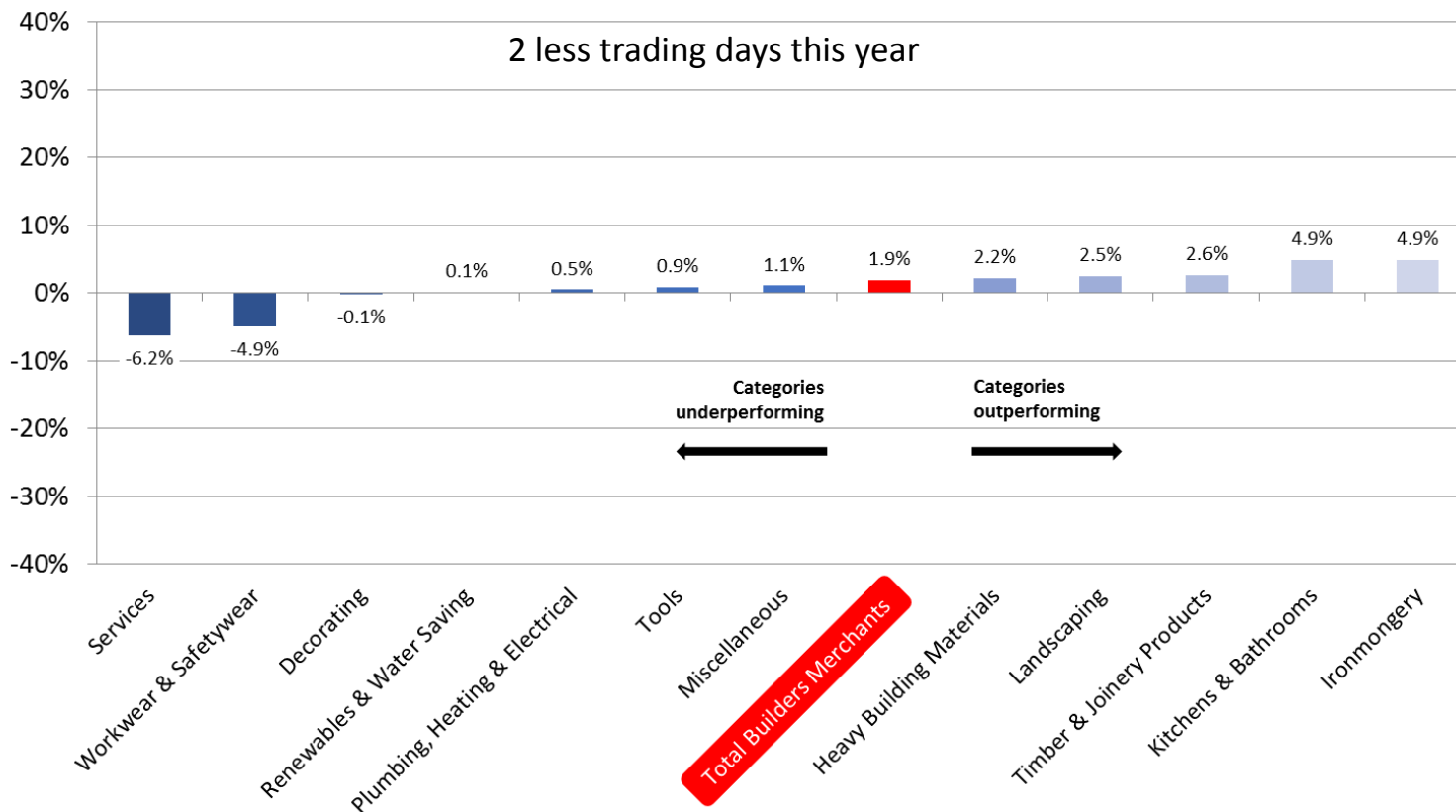


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2017

# Quarterly: This Year v Last Year

## Q2 2017 sales indices

### Quarter 2 2017 index v Quarter 2 2016 index

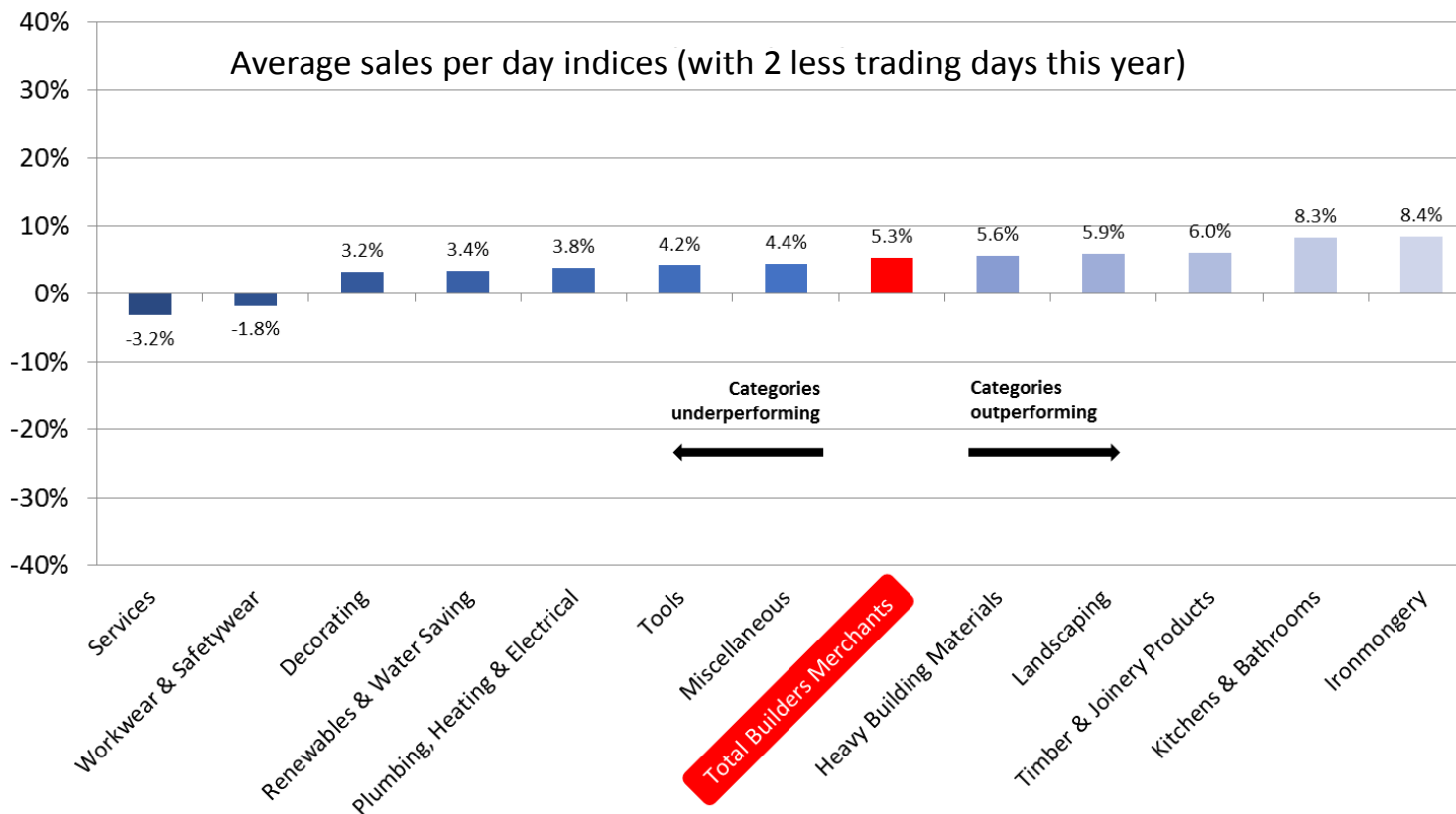


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2017

# Quarterly: This Year v Last Year

## Q2 2017 average sales per day indices

### Quarter 2 2017 index v Quarter 2 2016 index

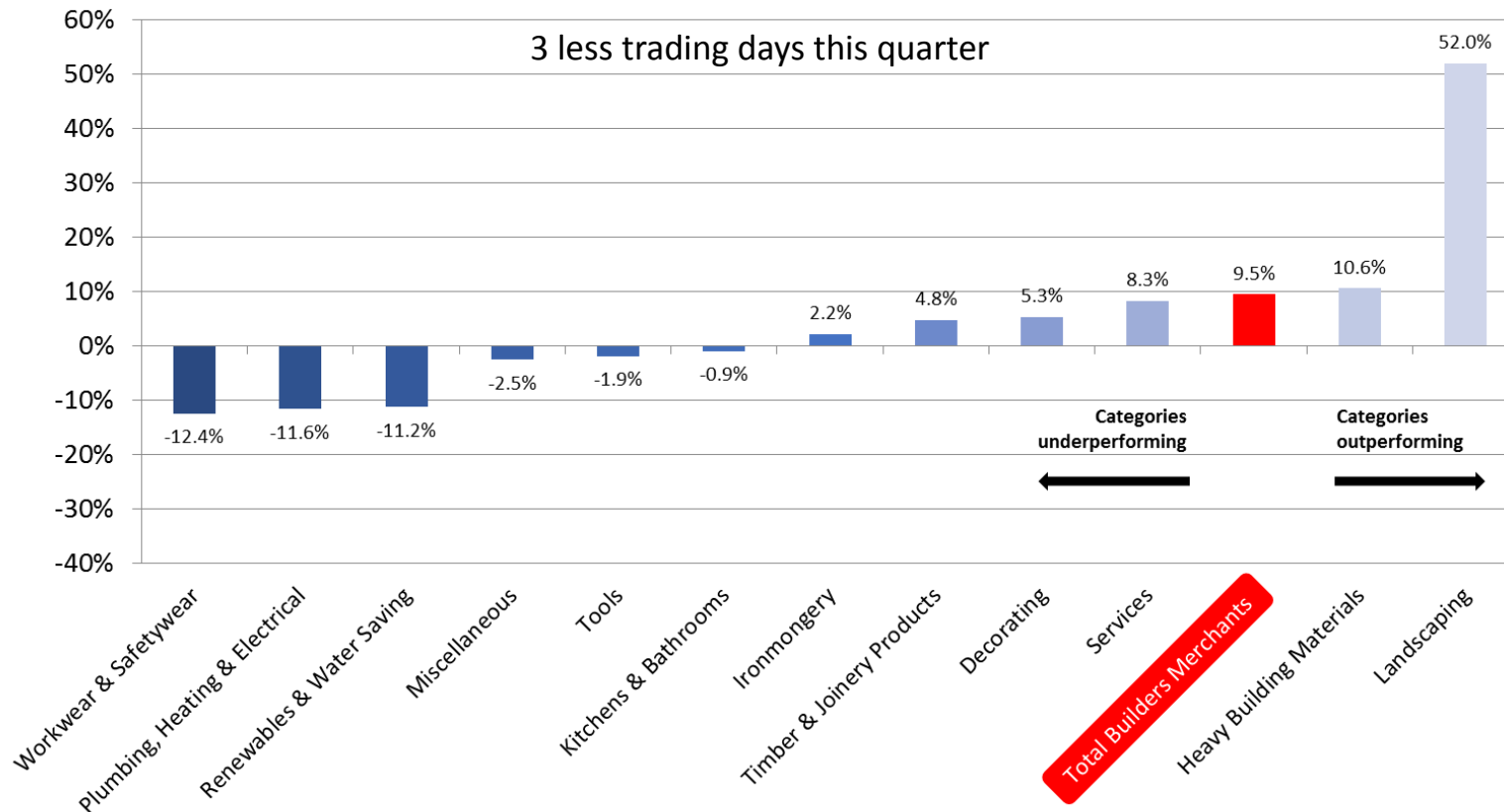


 Source: GfK's Builders Merchants Total Category Report July 2015 to June 2017

# Quarterly: Quarter on Quarter

## Q2 2017 sales indices

### Quarter 2 2017 index v Quarter 1 2017 index

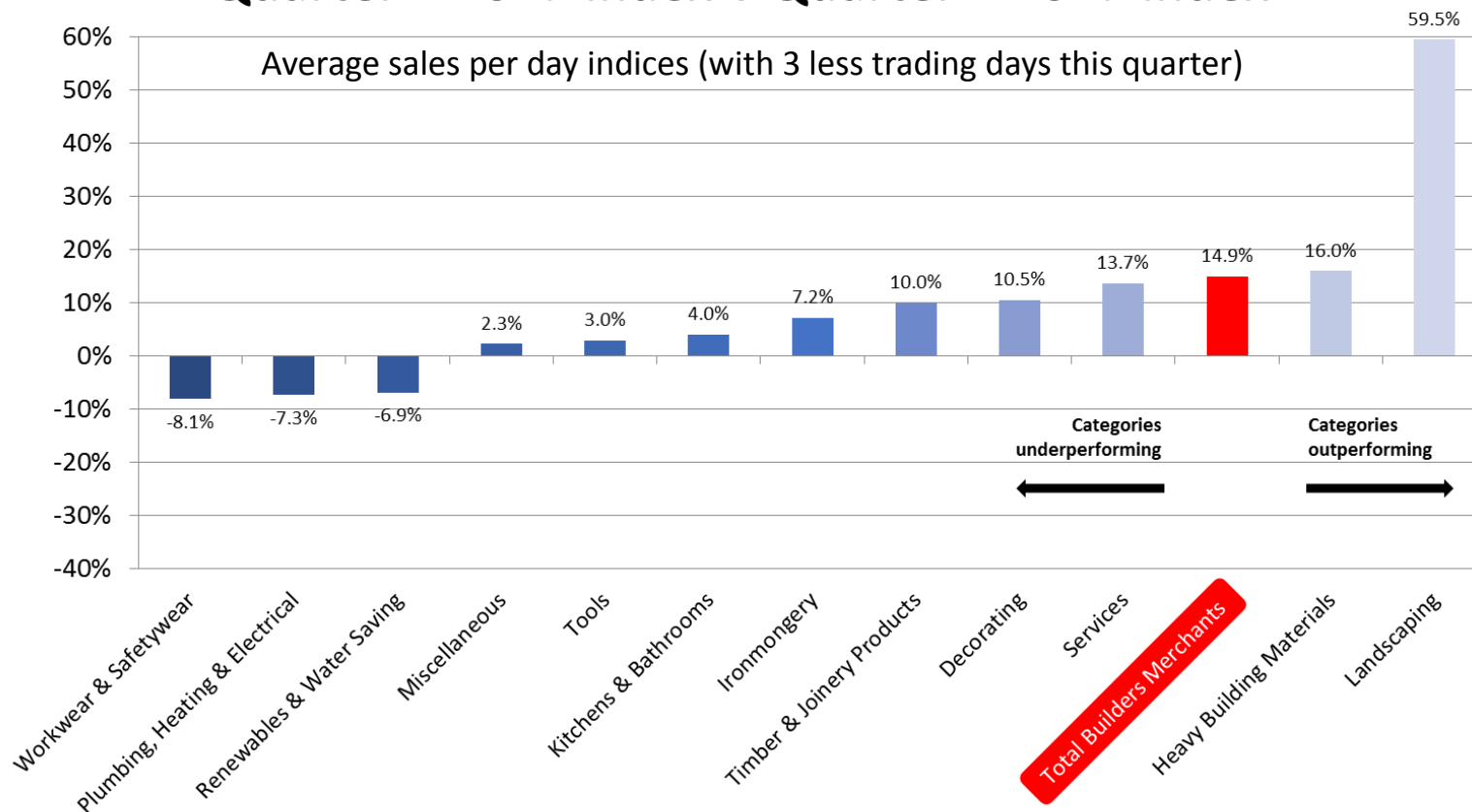


 Source: GfK's Builders Merchants Total Category Report July 2015 to June 2017

# Quarterly: Quarter on Quarter

## Q2 2017 average sales per day indices

### Quarter 2 2017 index v Quarter 1 2017 index

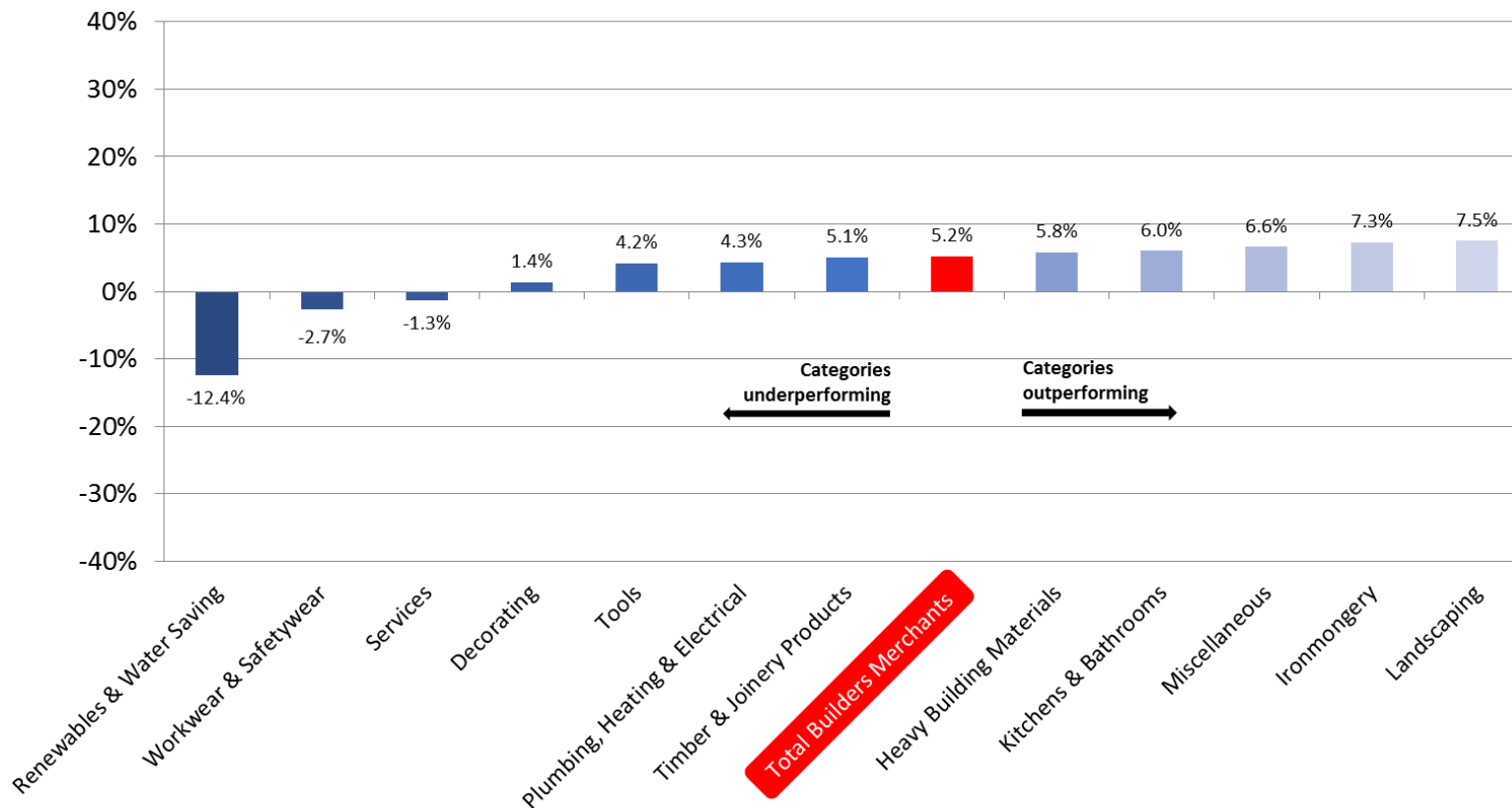


 Source: GfK's Builders Merchants Total Category Report July 2015 to June 2017



# Last 12 Months: Year on Year Rolling 12 months sales indices

## 12 months Aug 16 to Jul 17 v 12 months Aug 15 to Jul 16

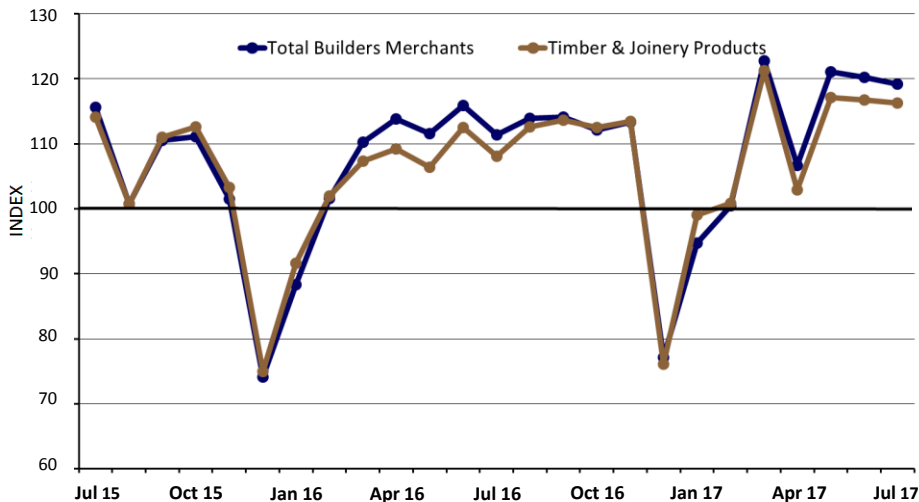


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2017

# Monthly indices

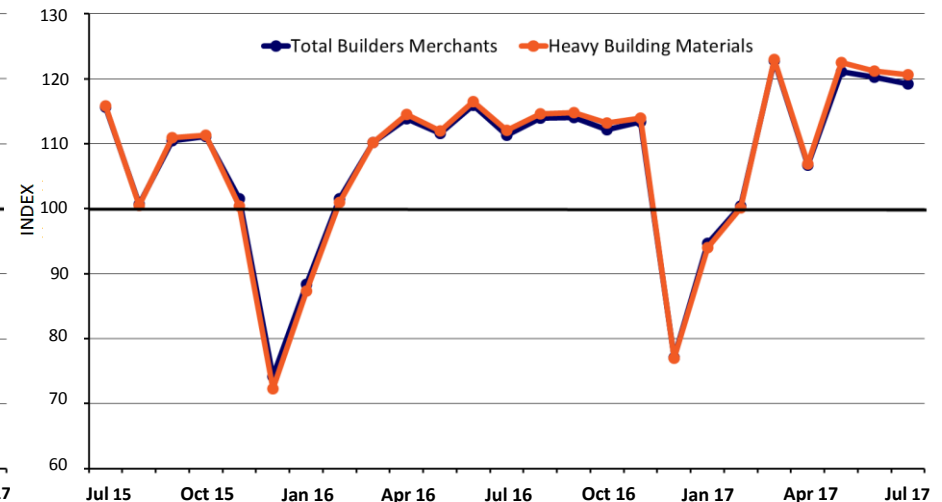
## July 2017

### Timber & Joinery Products



Indexed on July 2014 – June 2015

### Heavy Building Materials

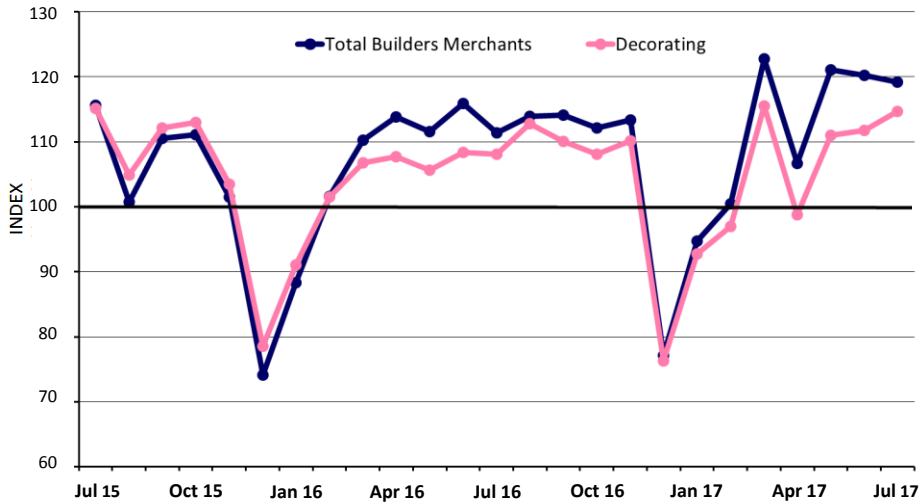


Indexed on July 2014 – June 2015

# Monthly indices

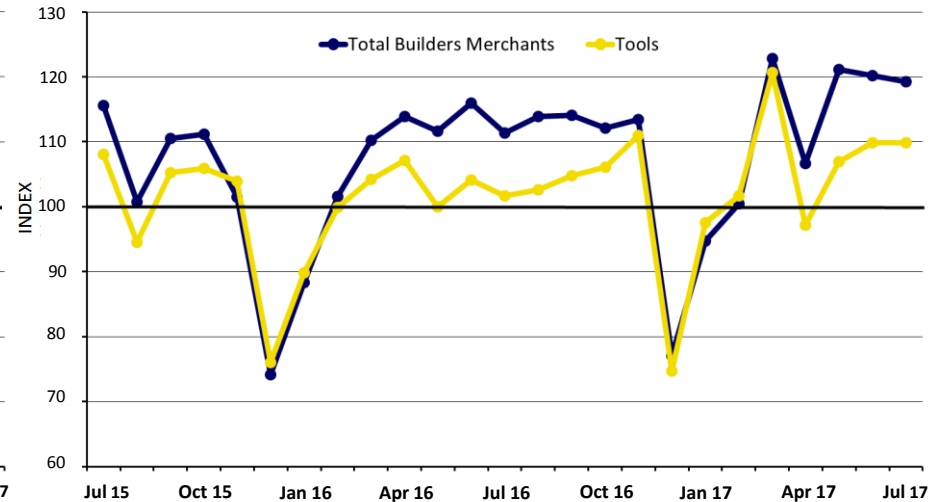
## July 2017

### Decorating



Indexed on July 2014 – June 2015

### Tools

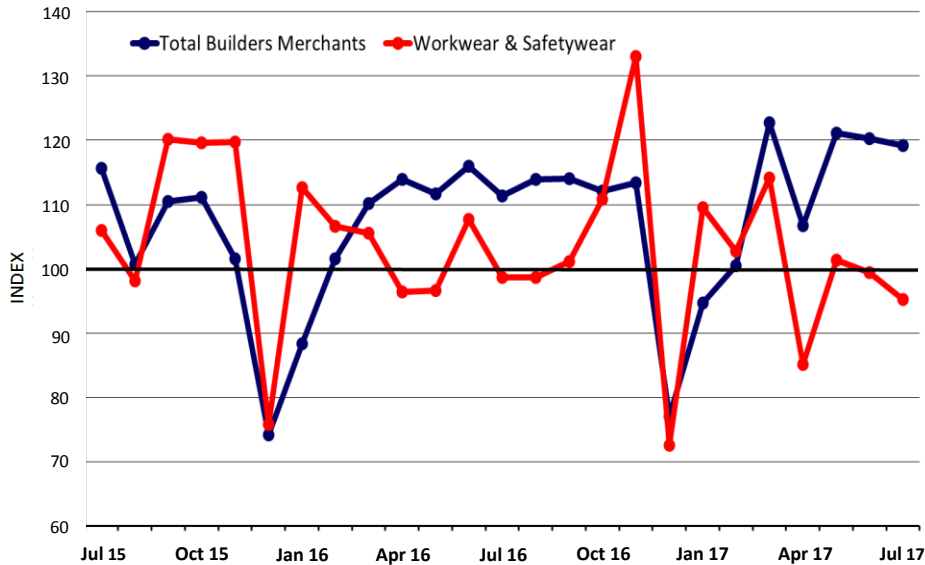


Indexed on July 2014 – June 2015

# Monthly indices

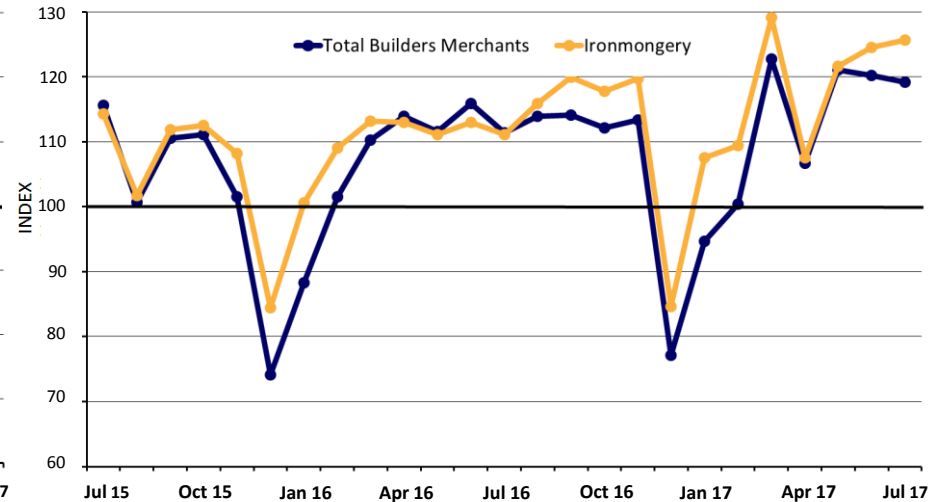
## July 2017

### Workwear & Safetywear



Indexed on July 2014 – June 2015

### Ironmongery



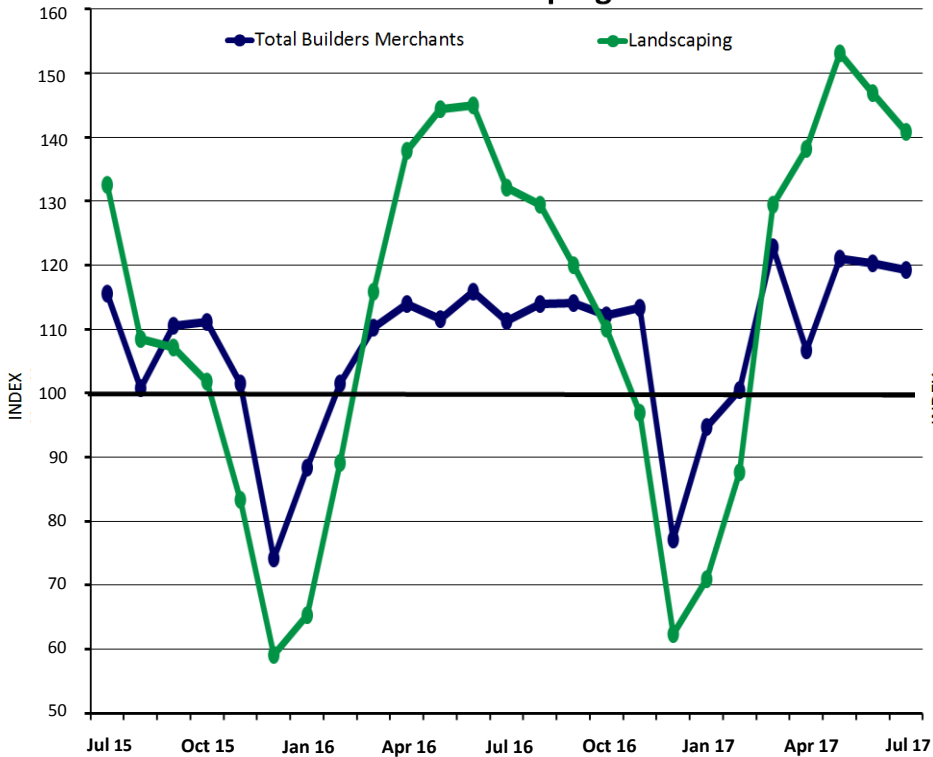
Indexed on July 2014 – June 2015

 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2017

# Monthly indices

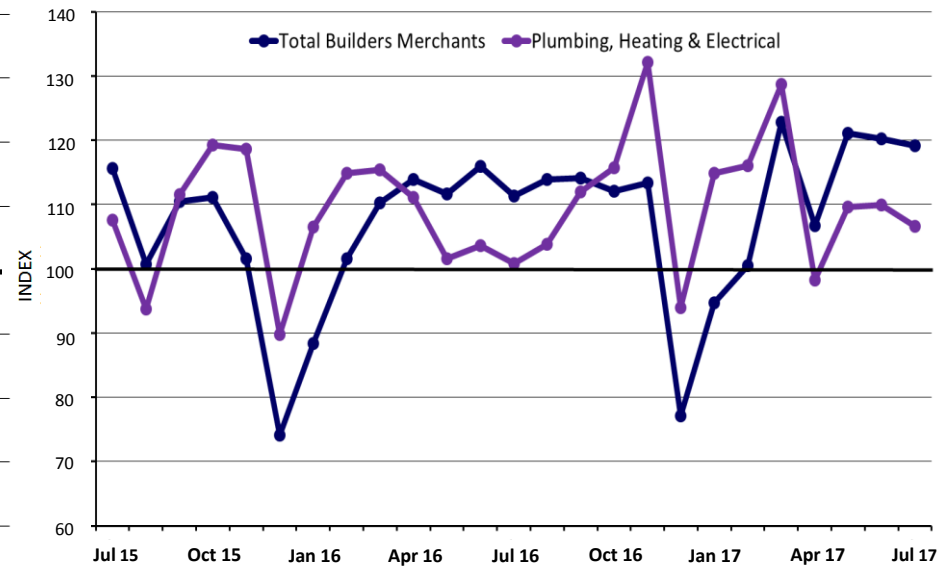
## July 2017

### Landscaping



Indexed on July 2014 – June 2015

### Plumbing, Heating & Electrical

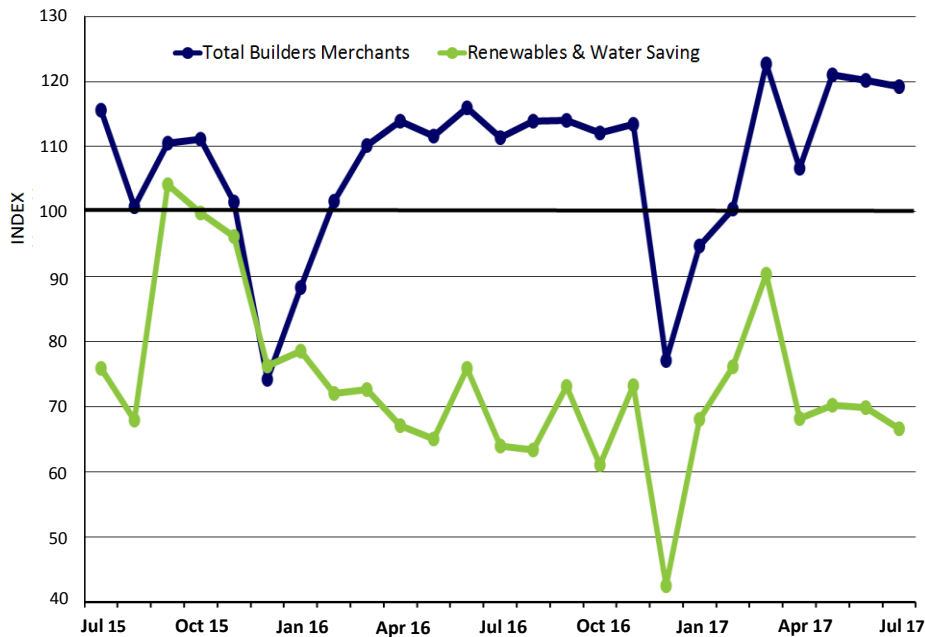


Indexed on July 2014 – June 2015

# Monthly indices

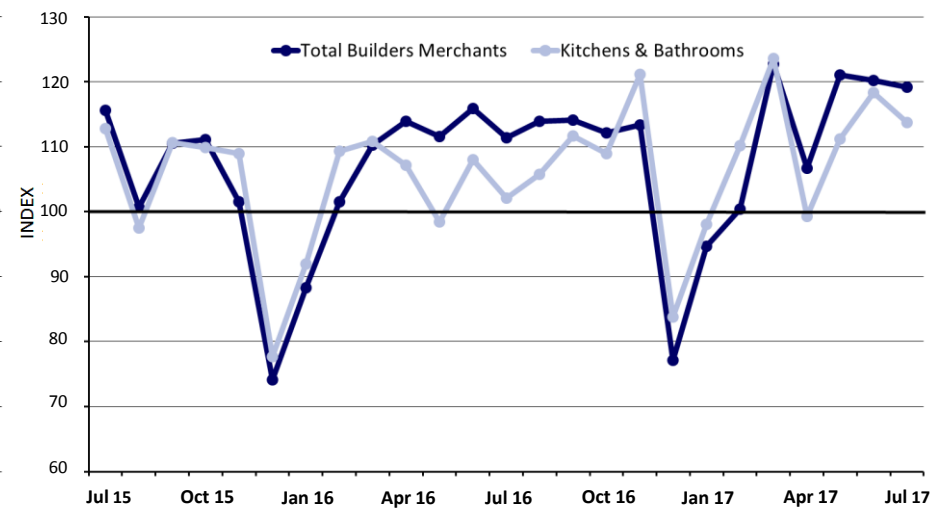
## July 2017

### Renewables & Water Saving



Indexed on July 2014 – June 2015

### Kitchens & Bathrooms



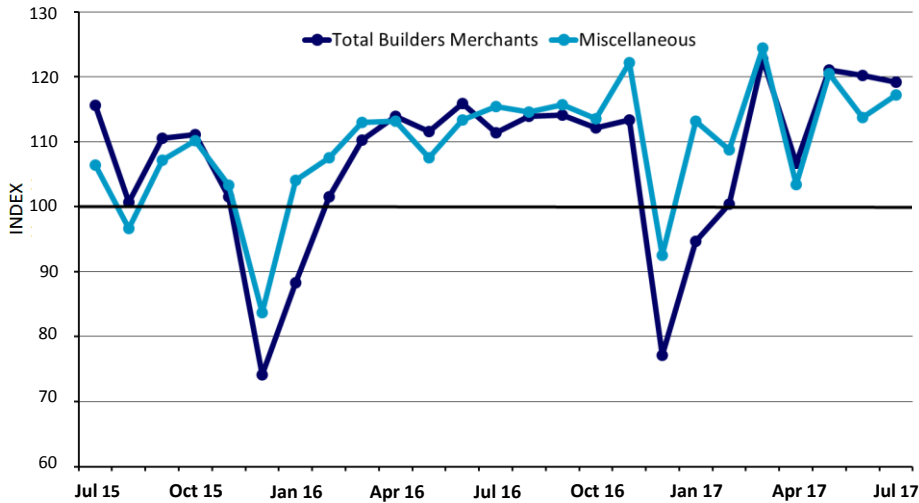
Indexed on July 2014 – June 2015

**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2017

# Monthly indices

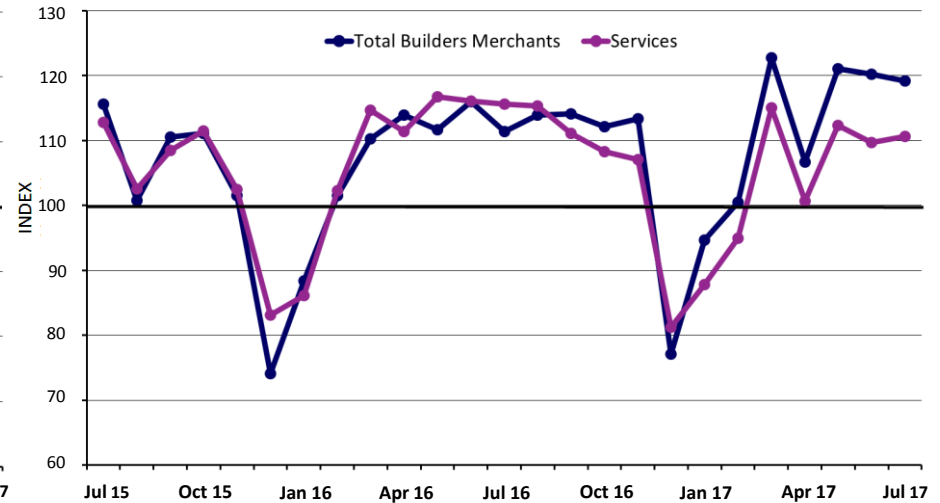
## July 2017

### Miscellaneous



Indexed on July 2014 – June 2015

### Services



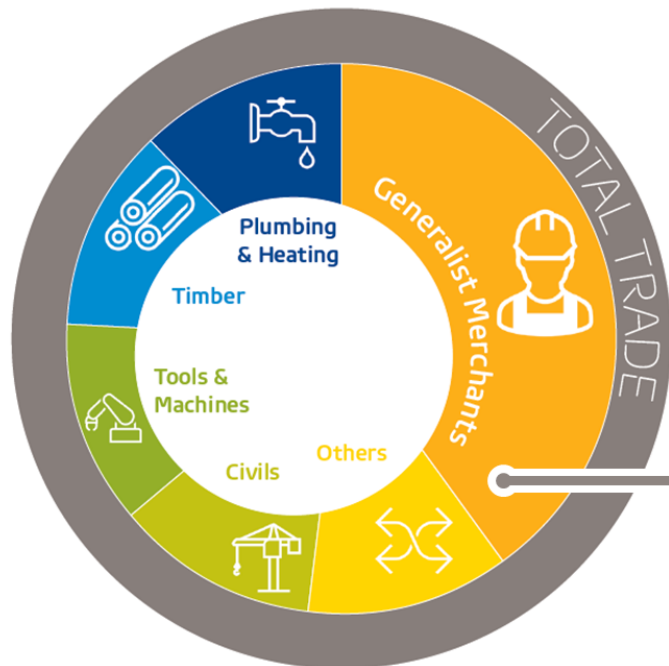
Indexed on July 2014 – June 2015

# GfK's Panel

## Generalist Builders Merchant Panel (GBM's)



### The Multiple Generalist Builders Merchants Channel



#### Generalist Builders Merchants

Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

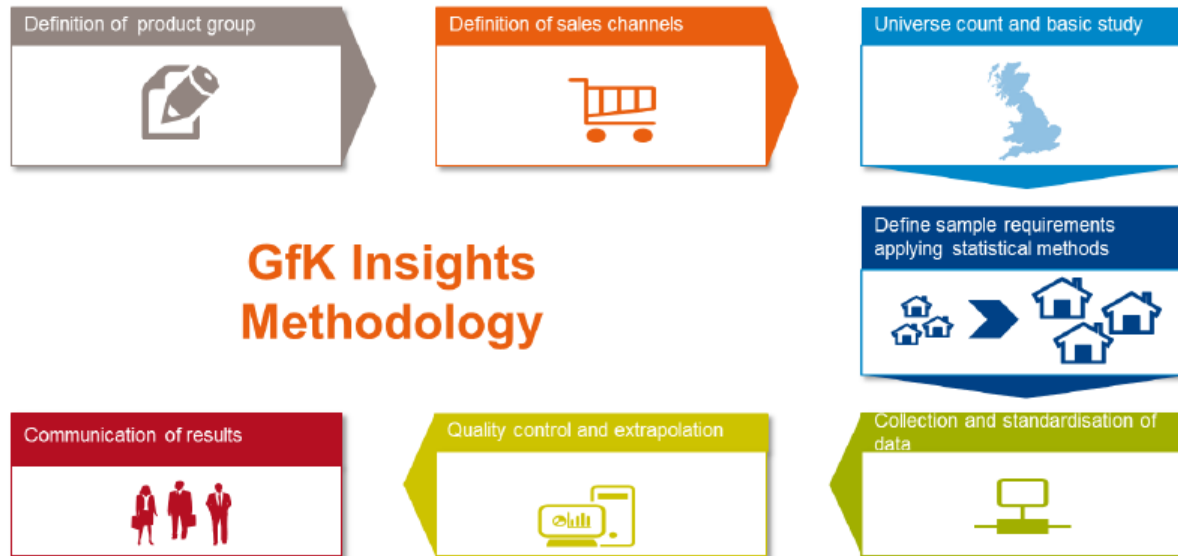
Multiple merchants are those defined as having more than 3 outlets or a turnover of greater than £3m p.a.

Examples include:





# GfK Insights Methodology



GfK collect live sales-out data from our panel of merchant partners.

We add value to that data through the application of each sold product's unique technical features. We compare like-for-like products and categories from like-for-like merchants and aggregate this within our reports.

Our international methodology is based on robust scientific principles and delivers continuous, reliable information that can be applied to your business requirements.

# GfK's Product Categories

Reports cover category headline values & in-depth, brand-level insights



## Headline values available

### Timber & Joinery Products

Timber  
Sheet Materials  
Cladding  
Flooring & Flooring Accessories  
Mouldings  
Stairs & Stairparts  
Window & Frames  
Doors/Door Frames

### Heavy Building Materials

Bricks Blocks & Damp Proofing  
Drainage/Civils/Guttering  
Lintels  
Cement/Aggregate/Cement Accs  
Concrete Mix/Products  
Plasters Plasterboards And Accessories  
Roofing Products  
Insulation  
Cement Mixers/Mixing Buckets Products  
Builders Metalwork  
Other Heavy Building Equipment/Material

### Decorating

Paint/Woodcare  
Paint Brushes Rollers & Pads  
Adhesives/Sealants/Fillers  
Tiles And Tiling Accessories  
Decoration Preparation & Decorating Sundries  
Wall Coverings

### Tools

Hand Tools  
Power Tools  
Power Tool Accessories  
Ladders & Access Equipment

### Workwear And Safetywear

Clothing  
Safety Equipment

### Ironmongery

Fixings And Fastenings  
Security  
Other Ironmongery

### Landscaping

Garden Walling/Paving  
Driveways/Block Paving/Kerbs  
Decorative Aggregates  
Fencing And Gates  
Decking  
Other Gardening Equipment

### Plumbing Heating & Electrical

Plumbing Equipment  
Boilers Tanks & Accessories  
Heating Equipment/Water Heaters/Temperature Control/Air Treatment  
Radiators And Accessories  
Electrical Equipment  
Lighting And Light Bulbs

### Renewables And Water Management

Water Saving  
Renewables & Ventilation

### Kitchens & Bathrooms

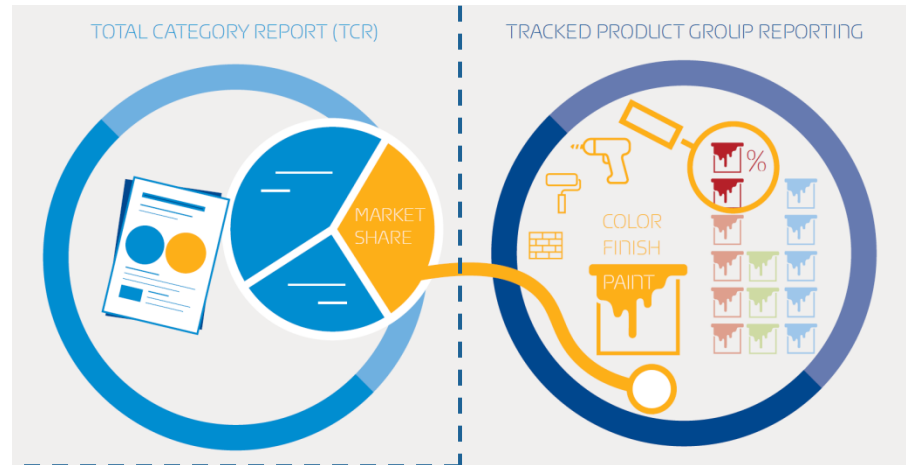
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### Miscellaneous

Cleaning/Domestic/Personal  
Automotive  
Glass  
Other Furniture & Shelving  
Other Misc

### Services

Toolhire / Hire Services  
Other Services



## In-depth product group reporting

Monthly sales values, volumes, pricing analysis & distribution facts available by brand and key product features.

For insights on your product group please contact Pete Church at GfK ([pete.church@gfk.com](mailto:pete.church@gfk.com)).

### Available categories:

#### Heavyside

Bricks  
Insulation

#### Lightside

Emulsion Paints (incl. Masonry & Base)  
Trim Paints  
Primers/Undercoats  
Woodcare  
Adhesives  
Sealants  
Fillers/PU Foam  
Tile Fixing (Adhesives/Grout)

# Contact us

## For further information



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