THE RISE OF DIGITAL BUSINESS AND HOW TO SUCCEED

2019

Acknowledgements

The survey team at Exec Survey would like to take this opportunity to thank all of those who were kind enough to take part – and especially those who found the time to offer additional insight through their extra comments. We would also like to thank our partner, Virgin Media Business, for its assistance in compiling the survey questions, scrutinising the responses and analysing the results.

To contact the Exec Survey team:

Email: enquiries@execnews.co.uk

Tel: 0845 094 8567

Address:
FAO Sandra Peet, Pacific House, Pacific Way,
Digital Park, Salford Quays, M50 1DR

exec survey

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The survey

The world is now digital. From the explosive expansion in data-driven service delivery to digitally disruptive business models such as Uber and Netflix that have fundamentally changed the way we consume products, the digital evolution is unavoidable.

Did you know?

32% of new technology investments will be driven by digital transformation[1]

As digital continues to advance, it's crucial that UK businesses can be confident in their ability to keep up to date with the latest trends and technologies. But enhancing existing tools and models is just the beginning. Digital transformation is about taking advantage of new innovations that completely change the way businesses work, the experiences they offer their customers and the value they deliver within their market.

However, many still face barriers to embracing digital. A recent Gartner study revealed that, while 62% of executives have a management initiative or transformation programme in place to build a digital business,[2] their expectations for technology have changed due to difficulties and costs, amongst other factors.

However, the study also found that a growing number of CEOs are concentrating on transforming their companies, including "a deeper understanding and movement to digital business".[3]

In our latest research, we partnered with digital leader Virgin Media Business, which works with more than 70,000 business customers in the UK. Together, we examined the ways in which UK companies are embracing the modern world of digital business, and the areas that are driving – or inhibiting – their progress. In particular, our study focused on:

- The functions and features organisations believe are essential for a modern business

- The extent to which developments such as mobile working, the cloud and artificial intelligence (AI) are impacting business improvements

- The barriers businesses face as they look to achieve their short- and long-term goals

- The importance of high digital maturity when it comes to delivering excellent customer experiences

[1] IDC, "IT Executive", idc.com/itexecutive.

[2] Computer Weekly, "Digital is a long-term objective, CEOs warned",
computerweekly.com/news/252440244/Digital-is-a-long-term-objective-CEOs-warned.

[3] Information Age, "Are CEO priorities shifting to embrace digital business?",
information-age.com/ceo-priorities-digital-business-123471729.

Survey methodologies and respondents' profile

This survey was conducted by Exec Survey in partnership with Virgin Media Business. The project ran from Thursday 15 March 2018 to Monday 16 April 2018.

106 individuals from 96 organisations participated in this survey – representing a broad cross-section of roles across UK enterprise and public-sector companies and institutions. This included: Business Development, Business Management, Chairman, Chief Executive, Commercial, Contracts, Customer Services, Digital, Engineering, Finance Management, Human Resources, Information, Information Technology Lead, IT Management, Managing Director, Marketing Communications, Operations, Organisational Planning, Procurement, Programme Management, Projects, Regulatory, Risk, Sales, Senior Manager, Strategy, Technical Services, and Transformation and Change.

Each respondent will have received a complimentary copy of the findings report. There was no inducement to take part in the survey, and Virgin Media Business was not introduced as the survey partner.

The results displayed throughout this report are based on the responses of those who fully completed the questionnaire, and are displayed as a percentage of this group unless explicitly stated otherwise.

Key findings

1
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The vast majority of survey participants (73%) label themselves as _Digital Desirers_ – they are beginning to adopt a digital agenda, but know that they need to do more.
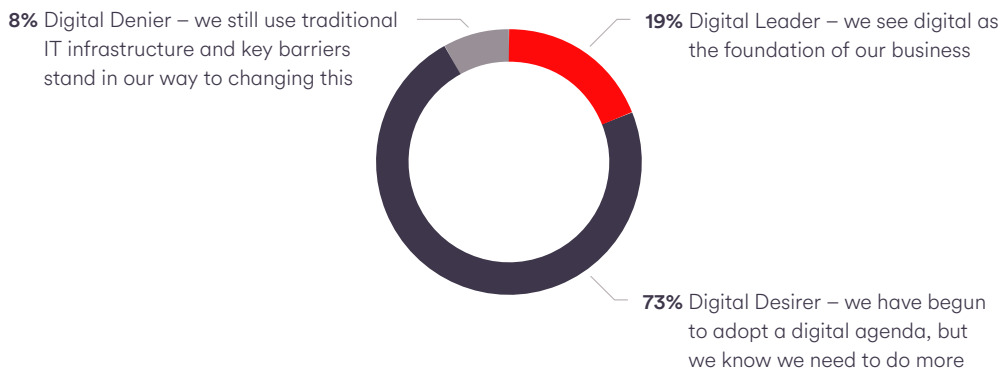
IDC anticipates that spending associated with global digital transformation will reach nearly $2 trillion by 2020.[4]

Today, however, just 19% would refer to themselves as _Digital Leaders_, who see digital as the foundation of their business, whilst 8% state they are _Digital Deniers_, who still rely heavily on the use of traditional infrastructure.

> **"The ability to exploit technology to its highest potential will determine a company's fate and fortune."**
>
> **— Forrester**

FIGURE 1: Which of the following best describes your business's approach to digitisation?

8% Digital Denier – we still use traditional IT infrastructure and key barriers stand in our way to changing this

19% Digital Leader – we see digital as the foundation of our business

73% Digital Desirer – we have begun to adopt a digital agenda, but we know we need to do more

Interestingly, 78% state that they rely on insight and guidance from partners and suppliers to stay up to date with the latest trends in their industry, best-practice guidance and new technology. And despite a perceived focus in recent years on the importance of social-media channels, just 22% of participants told us that they use these channels for this purpose.

[4] Deloitte, "Pivoting to digital maturity: Seven capabilities central to digital transformation", deloitte.com/insights/us/en/focus/digital-maturity/digital-maturity-pivot-model.html.

FIGURE 2: How does your business stay up-to-date with the latest trends and insights in your industry, best-practice guidance and new technology? Please tick all that apply.

Insight and guidance from partners and suppliers	78%
Industry events and conferences	75%
Consulting industry experts/publications	69%
Internal research projects	48%
Independent news pieces	39%
Social media	22%
Government funded articles	21%
Don't know	6%
Other – please specify	1%
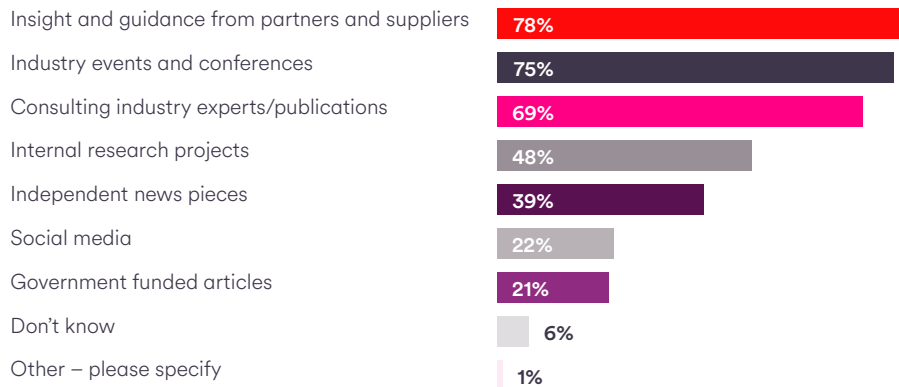
2

To continue to grow and gain a competitive edge in their market, organisations and IT leaders must invest in next-generation technologies that improve workplace productivity and employee adaptability – something that starts at the core of their infrastructure. But a number of different areas are preventing businesses from achieving their goals.

Almost three-quarters (70%) feel legacy technology can inhibit integration across their business, resulting in a drain on staff resources and time; a further 57% believe that a lack of staff training means technology is not being used to its full potential. In addition, 41% told us that their solutions are not user-friendly, and can be cumbersome and difficult to use. Just 17% felt that technology is not holding their organisation back.

FIGURE 3: Do you believe that technology in your business is holding you back from achieving your desired strategies and if so, how? Please tick all that apply.

Legacy technology can inhibit integration across the business, resulting in a drain on staff resources and time	**70%**
A lack of staff training regarding best-practice use of our technology platforms means they are not being used to their full potential	**57%**
Our solutions are not user-friendly, meaning they can be cumbersome and difficult to use	**41%**
A lack of mobility and connectivity means staff are only able to access internal systems within the office	**25%**
Our technology doesn't hold us back from achieving our strategies	**17%**

The most common drivers for pursuing digitisation across the business is the need to modernise and future-proof (72%) and increase productivity and efficiency (72%).

> **"Digital transformation strategies should extend across time horizons, taking into account today's possibilities, those coming soon, and those that may emerge further down the road."**
>
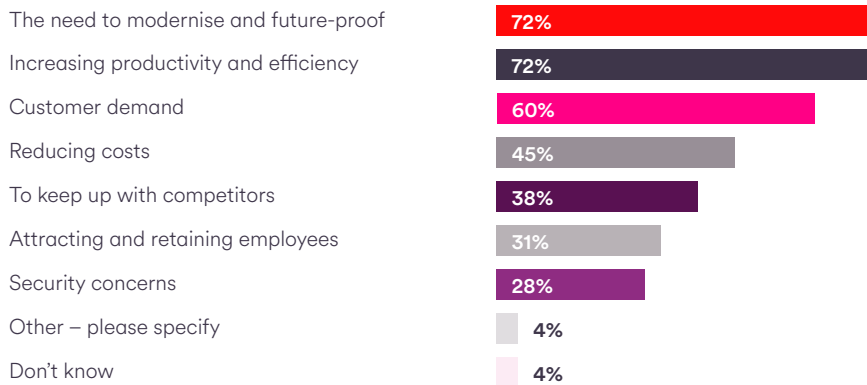> **— Deloitte[5]**

Customer demand is also a significant area of focus, with 60% stating that this was a driver for digitisation. Interestingly, less than half (45%) cite reducing costs as a driver, and just 28% report that security concerns play a role.

[5] Deloitte, "Beyond the digital frontier: Mapping your future", deloitte.com/insights/us/en/focus/tech-trends/2019/beyond-digital-frontier.html.
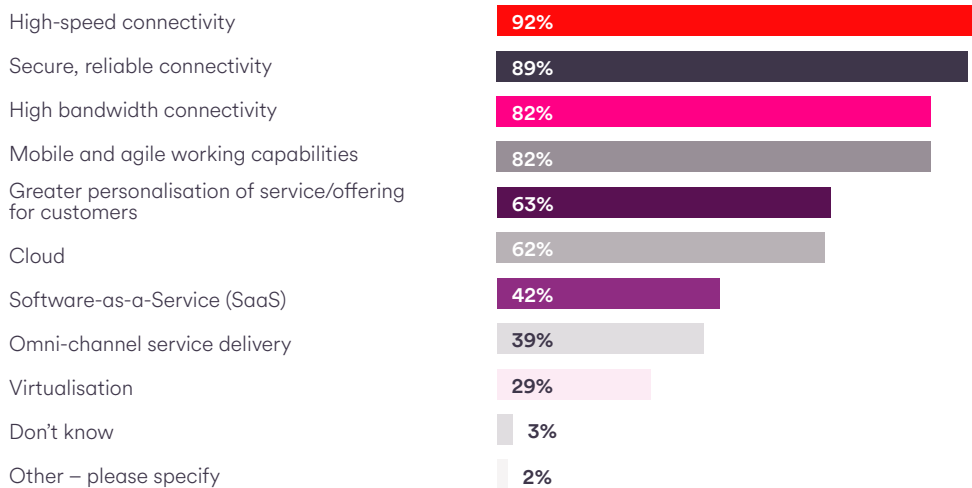
FIGURE 4: What do you believe are the main drivers for pursuing digitisation across the business? Please tick all that apply.

The need to modernise and future-proof	72%
Increasing productivity and efficiency	72%
Customer demand	60%
Reducing costs	45%
To keep up with competitors	38%
Attracting and retaining employees	31%
Security concerns	28%
Other – please specify	4%
Don't know	4%

Last year, some of the key areas of focus for IT leaders were adding bandwidth, exploring how software could modernise their networks and expanding their networking capabilities.[6] Similarly, for the year ahead, 44% of respondents in TechTarget's most recent IT Priorities Survey cited upgrading their networking foundations as a top priority.[7]

Perhaps predictably, high-speed connectivity (92%), secure and reliable connectivity (89%) and high-bandwidth connectivity (82%) all ranked as some of the top essential features for a modern business. Moreover, mobile and agile working capabilities also ranked highly (82%). Interestingly, roughly two-thirds also feel that the cloud (62%) and greater personalisation of service offering for customers (63%) are also critical.

FIGURE 5: Of the following list, what functions or features do you believe are essential to modern business? Please tick all that apply.

High-speed connectivity	92%
Secure, reliable connectivity	89%
High bandwidth connectivity	82%
Mobile and agile working capabilities	82%
Greater personalisation of service/offering for customers	63%
Cloud	62%
Software-as-a-Service (SaaS)	42%
Omni-channel service delivery	39%
Virtualisation	29%
Don't know	3%
Other – please specify	2%

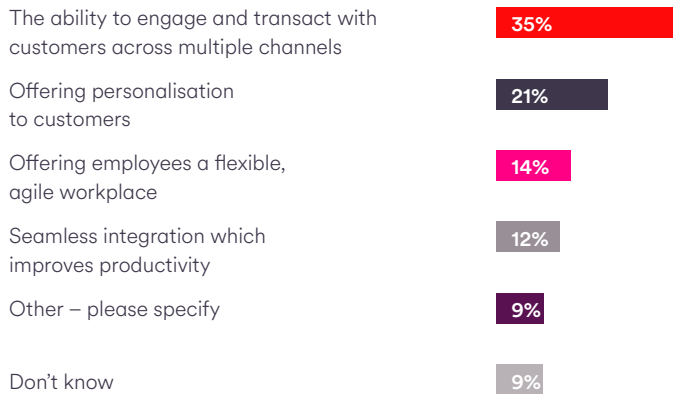[6] Deloitte, "Tech Trends 2019: Beyond the digital frontier",
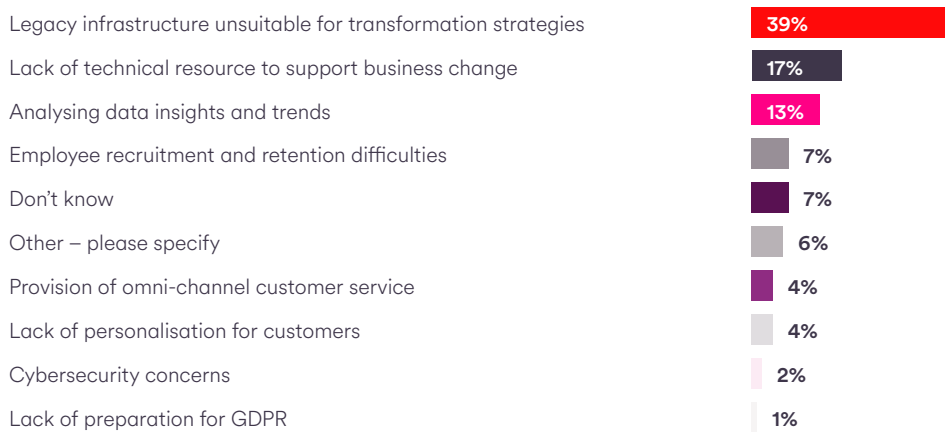   deloitte.com/content/dam/insights/us/articles/Tech-Trends-2019/DI_TechTrends2019.pdf.
[7] Ibid.

Over a third (35%) told us that their greatest strength is their ability to engage and transact with customers across multiple channels. Just over a fifth (21%) cite offering personalisation to customers as their greatest strength. By contrast, legacy technology is reported as the most common weakness across businesses, with 39% of participants stating that legacy infrastructure is unsuitable for implementing and achieving their transformation strategies. Following this, at some distance, is a lack of technical resource to support business change (17%).

FIGURE 6: Thinking about the business processes in your organisation, what do you believe is your single greatest strength?
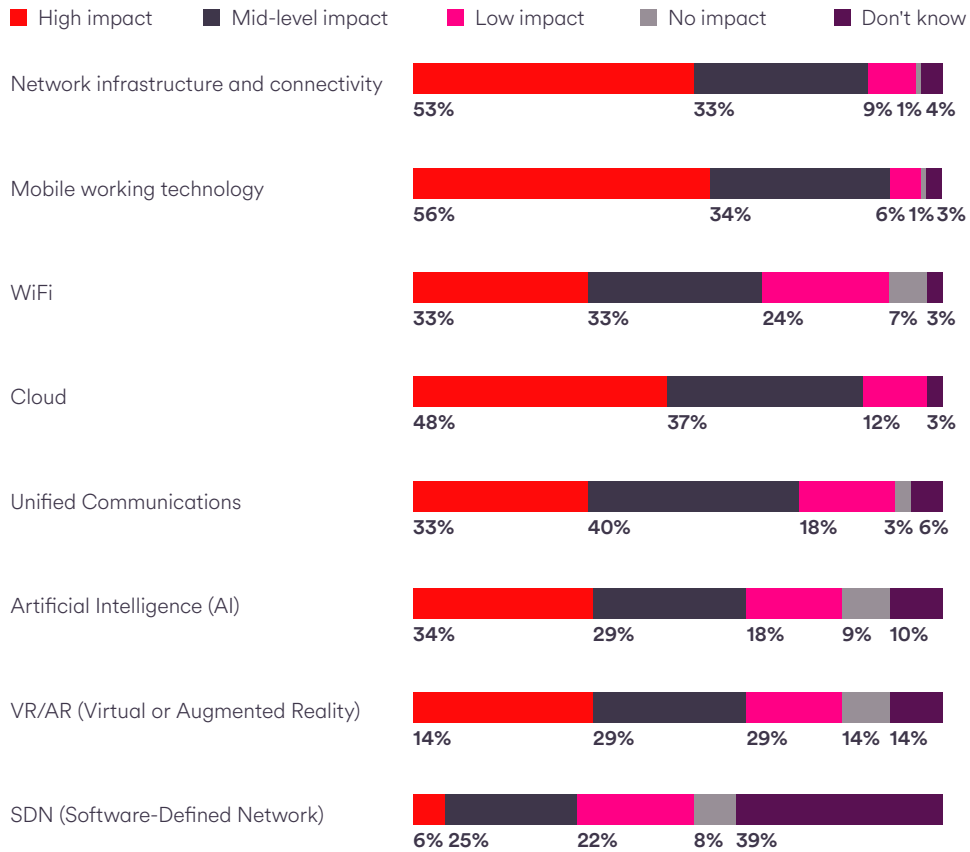
The ability to engage and transact with customers across multiple channels	35%
Offering personalisation to customers	21%
Offering employees a flexible, agile workplace	14%
Seamless integration which improves productivity	12%
Other – please specify	9%
Don't know	9%

FIGURE 7: By contrast, what do you believe is your business's greatest weakness at present?

Legacy infrastructure unsuitable for transformation strategies	39%
Lack of technical resource to support business change	17%
Analysing data insights and trends	13%
Employee recruitment and retention difficulties	7%
Don't know	7%
Other – please specify	6%
Provision of omni-channel customer service	4%
Lack of personalisation for customers	4%
Cybersecurity concerns	2%
Lack of preparation for GDPR	1%

It is interesting to note that many businesses still focus on more traditional forms of technology solutions, with over half of our participants stating that network infrastructure and connectivity (53%) and mobile working technology (56%) have a high potential to offer their business improvement in the future. The cloud also ranked highly (48%). In comparison, just 6% state that Software-Defined Networking (SDN) has a high potential for improvement, suggesting many are playing catch-up with technological advances.

FIGURE 8: Thinking about your current digital infrastructure, to what extent do you believe the following have the potential to offer your business improvement?

Legend: ■ High impact ■ Mid-level impact ■ Low impact ■ No impact ■ Don't know

Network infrastructure and connectivity
53%   33%   9% 1% 4%

Mobile working technology
56%   34%   6% 1% 3%

WiFi
33%   33%   24%   7% 3%

Cloud
48%   37%   12%   3%

Unified Communications
33%   40%   18%   3% 6%

Artificial Intelligence (AI)
34%   29%   18%   9%   10%

VR/AR (Virtual or Augmented Reality)
14%   29%   29%   14%   14%

SDN (Software-Defined Network)
6% 25%   22%   8%   39%

For more than a decade, the cloud, advanced analytics and other emerging technologies associated with delivering digital experiences have transformed the way IT departments work, reshaped business models and influenced entire markets. Now, new trends – from digital reality and cognitive technologies, to blockchain and machine learning – are starting to make their own impact.

With more advanced innovations disrupting even more marketplaces than ever before, CIOs and business leaders recognise the need for IT to make fundamental strategic changes, or risk falling behind.

69% of respondents in Deloitte's 2018 global CIO survey identified process automation and transformation as the primary focus of their digital agendas.[8]

Deloitte's seven digital-transformation catalysts

1. Connectivity

It's what brings different industries, departments, companies and people together – creating more sophisticated ways of collaborating and driving greater value.

2. Experience innovation

Designing experiences for everyone involves a human-centric approach – understanding the needs of customers, colleagues, partners and prospects, amongst others.

3. Cybersecurity

With more sensitive company, customer and personal information comes a need for new, advanced security measures that detect threats sooner and protect valuable data for longer.

4. Risk

New approaches, such as scenario planning and strategic responses, are needed to understand and avoid potential operational and financial risks.

5. Real-time data intelligence

Data is deemed the key differentiator in gaining that all-important competitive edge – giving organisations critical insights to use to their advantage.

6. Automation

What was once a clear-cut distinction between human and machine work is becoming less obvious, and organisations should consider reskilling workers to focus on tasks that boost workplace productivity and deliver greater value.

7. Game-changing technology

Combining information, operational and product technology will transform entire organisations – giving them a reliable platform for many years to come.

3

While it is encouraging to see that 68% of businesses surveyed have a formal strategy for embracing and/or improving digital solutions and infrastructure, this means that almost a third do not have a strategy in place.
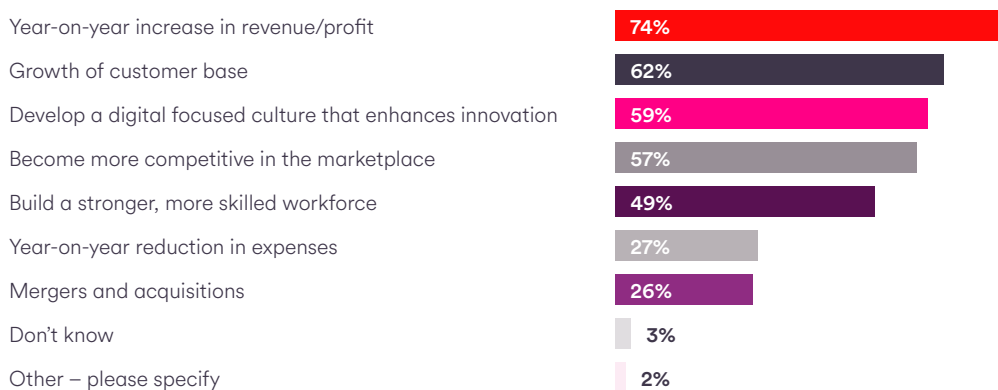
The evolution of digital technology in recent years means it is vital that businesses be able to fully embrace digital in order to remain competitive. With this in mind, it is encouraging to see that 19% want to put a strategy in place for the future.

FIGURE 9: Does your business have a formal strategy for embracing and/or improving digital solutions and infrastructure?

9% Don't know

4% No plans to implement

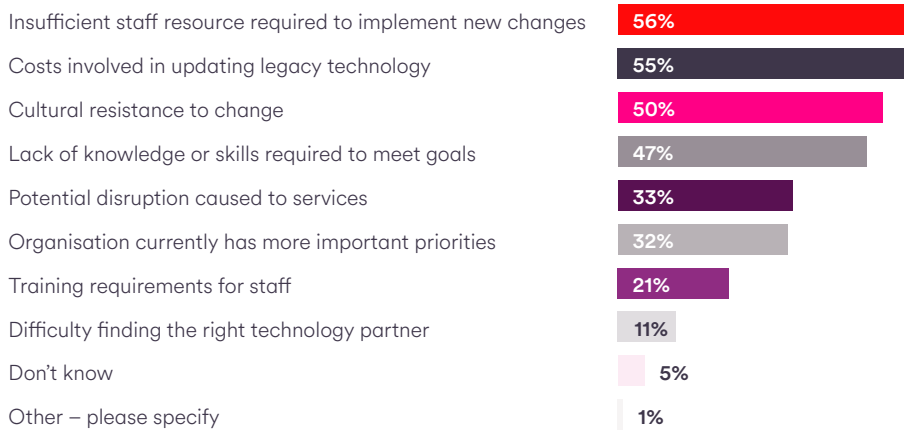**19%** No, but we are looking to implement one

68% Yes
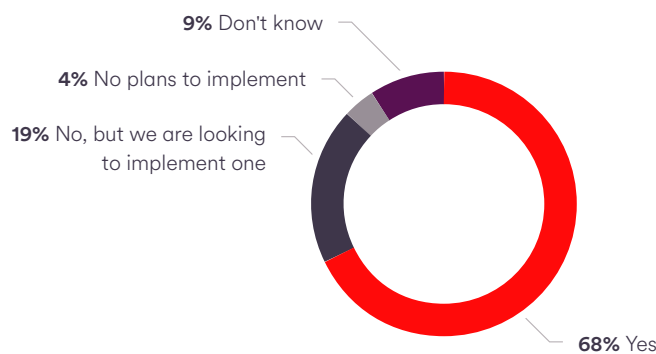
When we look at businesses' short-term goals, two-thirds (67%) are prioritising the improvement of productivity and operational efficiency. Meanwhile, when it comes to long-term goals, unsurprisingly 74% said there is a focus on increasing year-on-year revenues and profit. However, over half (59%) also want to develop a digital-focused culture that enhances innovation, and more than a quarter (26%) are considering mergers and acquisitions over the next five-to-ten-years.

FIGURE 10: Similarly, what do you believe are your business' long-term (five-to-ten-year) goals? Please tick all that apply

Year-on-year increase in revenue/profit	74%
Growth of customer base	62%
Develop a digital focused culture that enhances innovation	59%
Become more competitive in the marketplace	57%
Build a stronger, more skilled workforce	49%
Year-on-year reduction in expenses	27%
Mergers and acquisitions	26%
Don't know	3%
Other – please specify	2%

However, participants also report a number of barriers to achieving these goals. 56% cite having insufficient staff/resource to be able to implement new changes, and a further 55% told us that the cost of updating legacy technology is an issue. Moreover, half of participants (50%) state that there is a cultural resistance to change in their business.
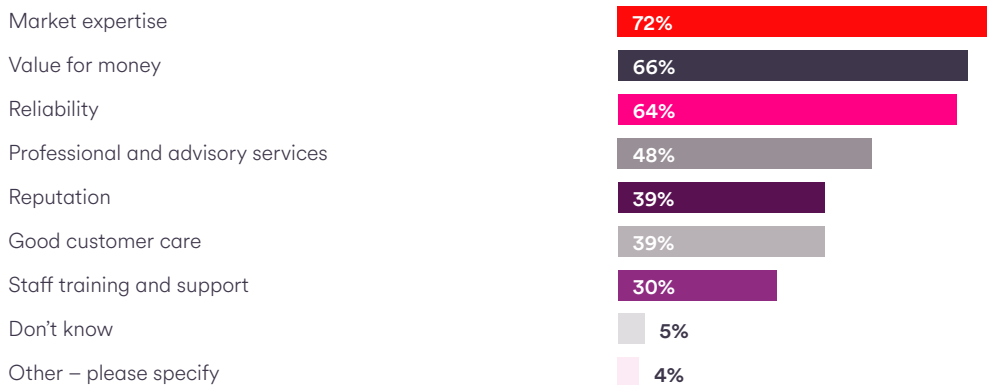
FIGURE 11: Do you feel there are any barriers or challenges that stand in the way of achieving these goals? Please tick all that apply.

Insufficient staff resource required to implement new changes	56%
Costs involved in updating legacy technology	55%
Cultural resistance to change	50%
Lack of knowledge or skills required to meet goals	47%
Potential disruption caused to services	33%
Organisation currently has more important priorities	32%
Training requirements for staff	21%
Difficulty finding the right technology partner	11%
Don't know	5%
Other – please specify	1%

The most important factor for survey participants when choosing a supplier or partner is market expertise (72%).

This was followed by value for money (66%) and reliability (64%). Interestingly, almost half (48%) are also looking for professional and advisory services to supplement their own in-house skills and expertise.

FIGURE 12: Which of the following areas are most important to your business when choosing a supplier or partner? Please tick all that apply.

Market expertise	72%
Value for money	66%
Reliability	64%
Professional and advisory services	48%
Reputation	39%
Good customer care	39%
Staff training and support	30%
Don't know	5%
Other – please specify	4%

Conclusion

By Rob Orr, Executive Director, Commercial Marketing at Virgin Media Business

Looking Towards Tomorrow

> **"We always overestimate the change that will occur in the next two years and underestimate the change that will occur in the next ten. Don't let yourself be lulled into inaction."**
>
> **— Bill Gates**

Today's business leaders are clearly aware of the urgent need to embrace digital. After all, most survey participants (73%) label themselves as *Digital Desirers*; they've started to adopt a digital agenda but know they need to do more.

While they're keen to modernise and future-proof their organisations, the vast majority feel that legacy technology and infrastructure is holding them back. Only 19% of respondents would refer to themselves as *Digital Leaders*, which shows that there's still work to do.

What's really interesting is that traditional "foundation" technology is still critical to the continued growth and success of most organisations. Just over half stated that network infrastructure and mobile working have the highest potential when it comes to delivering improvement in the future. And when it comes to connectivity, a massive 92% felt that high speed was essential, closely followed by security, reliability and high bandwidth.

Tradition versus transformation

The message that legacy technology is a massive problem for businesses came through loud and clear.

It emerged as the most common weakness, with 39% of participants saying that their legacy infrastructure will prevent them implementing and achieving their transformational strategies. The amount of investment needed is also an issue, with 55% telling us that the cost of updating their legacy technology is a big concern.

Almost three-quarters of respondents feel that it's holding up integration and is a drain on staff, resources and time. This is closely linked to another very common issue: not having enough people (or the right people) to support change. 56% said they had insufficient staff or resources to be able to implement new developments. With that in mind, it's not surprising that almost half of the organisations we spoke to are looking for professional and advisory services to supplement their own in-house skills and expertise, for help unravelling the tangle of legacy infrastructure.

The most common drivers for pursuing digitisation are to modernise and future-proof, while increasing productivity and efficiency (both 72%). With everything around us moving at an alarming rate, businesses must advance if they're to stay ahead – or even just keep up!

Customer demand is also a significant area of focus (at 60%) but how can businesses achieve this when it's clear that they're pushed for resource and constrained by the technology they currently have?

Partnering is proving to be a good option, as is laying down the foundations for more modern technology to replace legacy systems. The majority are starting with connectivity that has to be fast (92%), secure and reliable (89%), with high bandwidth (82%).

As we enter this era of immense change, businesses have plenty of emerging technologies to look forward to.

The power and potential of our computational systems are reaching unprecedented heights. AI and robotics are imitating human brains to release people from mundane tasks, and our physical environments and assets are being enhanced by digital renders.

The possibilities are endless.

In summary

This survey has shown that there's never been a more critical time to build a digital business, and that companies are actively seeking trusted partners who can help them do just that. After all, with a barrier of legacy technology draining resource – and a barrage of new external challenges to contend with – it makes no sense to go it alone.

Virgin Media Business can help every organisation become truly digital. We provide support and best-practice guidance, and offer cutting-edge connectivity and workplace solutions so organisations can transcend their legacy technology and become stronger digital businesses.

It's still work, but not as you know it.

We'd love to talk to you about how we can help you digitally transform. So please do drop us an email at enterprise@virginmedia.co.uk if you'd like to start a conversation.

Appendix one: Survey questions

QUESTION: Which of the following best describes your business's approach to digitisation?

Answer	Percentage
Digital Desirer – we have begun to adopt a digital agenda, but we know we need to do more	73%
Digital Leader – we see digital as the foundation of our business	19%
Digital Denier – we still use traditional IT infrastructure and key barriers stand in our way to changing this	8%

GRID QUESTION: Thinking about your current digital infrastructure, to what extent do you believe the following have the potential to offer your business improvement?

Network infrastructure and connectivity

Answer	Percentage
High impact	53%
Mid-level impact	33%
Low impact	9%
Don't know	4%
No impact	1%

Mobile working technology

Answer	Percentage
High impact	56%
Mid-level impact	34%
Low impact	6%
Don't know	3%
No impact	1%

WiFi

Answer	Percentage
High impact	33%
Mid-level impact	33%
Low impact	24%
No impact	7%
Don't know	3%

Cloud

Answer	Percentage
High impact	48%
Mid-level impact	37%
Low impact	12%
Don't know	3%
No impact	0%

Unified Communications

Answer	Percentage
Mid-level impact	40%
High impact	33%
Low impact	18%
Don't know	6%
No impact	3%

AI (Artificial Intelligence)

Answer	Percentage
High impact	34%
Mid-level impact	29%
Low impact	18%
Don't know	10%
No impact	9%

VR/AR (Virtual or Augmented Reality)

Answer	Percentage
Mid-level impact	29%
Low impact	29%
High impact	14%
No impact	14%
Don't know	14%

SDN (Software-Defined Network)

Answer	Percentage
Don't know	39%
Mid-level impact	25%
Low impact	22%
No impact	8%
High impact	6%

QUESTION: Of the following list, what functions or features do you believe are essential to modern business? Please tick all that apply.

Answer	Percentage
High-speed connectivity	92%
Secure, reliable connectivity	89%
High-bandwidth connectivity	82%
Mobile and agile working capabilities	82%
Greater personalisation of service/offering for customers	63%
Cloud	62%
Software-as-a-Service (SaaS)	42%
Omni-channel service delivery	39%
Virtualisation	29%
Don't know	3%
Other – please specify	2%

QUESTION: Do you believe that technology in your business is holding you back from achieving your desired strategies and if so, how? Please tick all that apply.

Answer	Percentage
Legacy technology can inhibit integration across the business, resulting in a drain on staff resources and time	70%
A lack of staff training regarding best-practice use of our technology platforms means they are not being used to their full potential	57%
Our solutions are not user-friendly, meaning they can be cumbersome and difficult to use	41%
A lack of mobility and connectivity means staff are only able to access internal systems within the office	25%
Our technology doesn't hold us back from achieving our strategies	17%
Other – please specify	6%
Don't know	5%

QUESTION: Thinking about the business processes in your organisation, what do you believe is your single greatest strength?

Answer	Percentage
The ability to engage and transact with customers across multiple channels	35%
Offering personalisation to customers	41%
Seamless integration which improves productivity	12%
Offering employees a flexible, agile workplace	14%
Other – please specify	9%
Don't know	9%

QUESTION: By contrast, what do you believe is your business's greatest weakness at present?

Answer	Percentage
Legacy infrastructure unsuitable for transformation strategies	39%
Lack of technical resource to support business change	17%
Analysing data insights and trends	13%
Employee recruitment and retention difficulties	7%
Don't know	7%
Other – please specify	6%
Provision of omni-channel customer service	4%
Lack of personalisation for customers	4%
Cybersecurity concerns	2%
Lack of preparation for GDPR	1%

QUESTION: Does your business have a formal strategy for embracing and/or improving digital solutions and infrastructure?

Answer	Percentage
Yes	68%
No, but we are looking to implement one	19%
Don't know	9%
No plans to implement	4%

QUESTION: Approximately how far through this strategy is your business?

Answer	Percentage
25 to 50%	30%
Up to 25%	28%
51 to 75%	25%
More than 75%	10%
Don't know	6%
We have completed our strategy	1%

QUESTION: Looking ahead, what would you cite as your short-term (one-to-two-year) goals? Please tick all that apply.

Answer	Percentage
Improving productivity	67%
Creating operational efficiencies	67%
Increasing digital service delivery	60%
Reducing costs	57%
Updating/upgrading legacy technology	55%
Improving customer satisfaction	54%
Attracting new talent and skills to the business	47%
Provision of modern digital services across the business	44%
Increasing employee engagement and retention	42%
Implementing or increasing flexible working practices	37%
Improving levels of personalisation available to customers	35%
Don't know	3%
Other – please specify	2%

QUESTION: Similarly, what do you believe are your business's long-term (five-to-ten-year) goals? Please tick all that apply.

Answer	Percentage
Year-on-year increase in revenue/profit	74%
Growth of the customer base	62%
Develop a digital-focused culture that enhances innovation	59%
Become more competitive in the marketplace	57%
Build a stronger, more skilled workforce	49%
Year-on-year reduction in expenses	27%
Mergers and acquisitions	26%
Don't know	3%
Other – please specify	2%

QUESTION: Do you feel there are any barriers or challenges that stand in the way of achieving these goals? Please tick all that apply.

Answer	Percentage
Insufficient staff resource required to implement new changes	56%
Costs involved in updating legacy technology	55%
Cultural resistance to change	50%
Lack of knowledge or skills required to meet goals	47%
Potential disruption caused to services	33%
Organisation currently has more important priorities	32%
Training requirements for staff	21%
Difficulty finding the right technology partner	11%
Don't know	5%
Other – please specify	1%

QUESTION: What do you believe are the main drivers for pursuing digitisation across the business? Please tick all that apply.

Answer	Percentage
The need to modernise and future-proof	72%
Increasing productivity and efficiency	72%
Customer demand	60%
Reducing costs	45%
To keep up with competitors	38%
Attracting and retaining employees	31%
Security concerns	28%
Other – please specify	4%
Don't know	4%

QUESTION: Which of the following areas are most important to your business when choosing a supplier or partner? Please tick all that apply.

Answer	Percentage
Market expertise	72%
Value for money	66%
Reliability	64%
Professional and advisory services	48%
Reputation	39%
Good customer care	39%
Staff training and support	30%
Don't know	5%
Other – please specify	4%

QUESTION: How does your business stay up-to-date with the latest trends and insights in your industry, best-practice guidance and new technology? Please tick all that apply.

Answer	Percentage
Insight and guidance from partners and suppliers	78%
Industry events and conferences	75%
Consulting industry experts/publications	69%
Internal research projects	48%
Independent news pieces	39%
Social media	22%
Government-funded articles	21%
Don't know	6%
Other – please specify	1%

QUESTION: Which of the following external factors do you believe will have the greatest impact on your business over the next twelve months? Please tick all that apply.

Answer	Percentage
Government and political legislation, such as the General Data Protection Regulation (GDPR)	54%
Economic uncertainty due to Brexit	53%
UK political landscape	43%
Global political landscape	30%
Sustainability and green agenda	27%
Millennials/Generation Z entering the workforce	25%
Reducing carbon footprint	17%
The potential for new trade deals	16%
Don't know	6%
Other – please specify	5%

Appendix two: Participating organisations

Adecco	IG
Airbus	Imperial Tobacco
Aldermore Bank	Integral
Amazon	Interserve
AXA	Intu Properties
Balfour Beatty	Ishida Europe
BAM Nuttall	Islamic Bank of Britain
Bank of Ireland	Jurys Inns
Barhale	Kier
Bechtel	Konecranes
Bergstrom	L.E.K. Consulting
C Butt	Lagan Cement
Cash Converters	Legal & General Investment Management
Cath Kidston	Lemac
Charles Tyrwhitt	Lend Lease Construction
Chiltern Cold Storage Group	Marsden Building Society
Close Brothers	Marshalls
Coats	Molson Coors Brewing
Compass	MSX
Costain	Murphy
Dyson	MWH Treatment
Ebiquity	N Brown
Ecology Building Society	Norgren
Edinburgh Airport	Nuttall
Eurovia	Porvair
Fat Face	Prater
FES Ltd	Redde
Freeths	Renishaw
Galliford Try	Rico
Go-Ahead Group	Ricoh
GPS PE Pipe Systems	Royal Mail
Hargreaves Lansdown	RPMI
Hastings Insurance Services	Saffron Building Society
Hilton Hotels	Search Consultancy
Holland & Barrett	Serco
Hutchison Ports	Shawbrook Bank

Shop Direct Home Shopping

Skanska

Smith & Williamson

Southern Railway

SSVC

Stroma Group

Taylor Wimpey

The Channel Tunnel Group

The Edrington Group

The Natural Power Consultants

Thomas Johnstone

Thorntons Law

Training 2000

Transport Scotland

Turkish Bank

Turner & Townsend

Ulster Carpets

VGC Group

VP

Wage Day Advance

Walker Filtration

Weightmans

Wienerberger

Yorkshire Building Society

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