Rethink how you cultivate trustworthy technology

Results and insights from our Global Digital Ethics Survey

(Time to read: 12 minutes)
Executive summary

As executives look to renew and grow their business with digital technology, the imperative of digital ethics is getting widespread attention.

There are many factors to consider, including recent regulatory action (relating to issues like privacy, content moderation and tech monopolism), as well as growing concerns about technology’s ethical harms (relating to issues like surveillance, harmful bias, misinformation, and the amplification of hate speech and calls for violence).

At the same time, there’s been great progress with technology bringing about ethically positive change (relating to issues like accessibility, physical health and safety, and child protection). And importantly, we see all of these issues coming to the forefront of enterprise and technology strategy, as executives work to attract more customers, employees and investors by demonstrating a commitment to responsible business practices.

Over the past five years, the executives in your organization have likely had to strike a balance with difficult technology questions like:

• How can we capitalize on the efficiency of AI technologies without running the risk of perpetuating bias and inequality?
• How do we personalize the customer experience without violating customers’ expectations of privacy?
• How can we empower our workforce with technology that’s inclusive and accessible?

Careful consideration of these and other ethical questions will help guide technology projects that increase customer satisfaction, employee loyalty and tech adoption rates. More importantly, it will help ensure that successful projects don’t come at the expense of certain individuals, social institutions or the environment. If that’s not enough incentive, ignoring these questions or hashing them out too quickly can lead to costly risk events and severe reputational damage.

To find out more about how organizations are addressing these issues, the outcomes they’re experiencing and their plans for the future, we fielded a Global Digital Ethics Survey with 800 business and technology leaders. This report explores results from that survey, with key takeaways we can all use to improve our ethical practices.
Key findings

Leaders understand the value of digital ethics, but their practices are inconsistent.

Overall, there are notable bright spots to celebrate, but still vast room for improvement in structure and consistency. Among the key findings from our research, we saw that:

- **Leaders see digital ethics as a tech issue:**
  34% of respondents said the IT function owns ongoing responsibility, far more than legal, marketing or any other function.

- **Training is the biggest focus:**
  More than rolling out specific policies, dedicated teams or governance structures for digital ethics, 48% of respondents said their organizations are training employees to make better ethical decisions.

- **Digital ethics budgets are going up:**
  Over 60% of respondents said they plan to increase efforts and investments in digital ethics, and another third said they expect to continue at current levels.

- **Many factors determine commitment to digital ethics:**
  Respondents were more likely to say their firm addresses digital ethics comprehensively if they had a defined set of corporate values (48% vs. 30%), a robust risk management program (48% vs. 34%), or if they experience pressure from customers and partners to meet explicit standards (48% vs. 36%).

- **Sentiment about digital ethics varies for many reasons, including regional differences:**
  For example, on the issue of how well their firm’s culture sets the tone for ethical technology decisions, 9% of respondents from the U.K., France and Germany said they were performing so poorly that they experience negative business consequences, compared with only 2% from the U.S. and Canada.

Ethics in action

Existing culture and programs influence your approach

Organizations are more likely to address digital ethics comprehensively if they have a defined set of corporate values, a robust risk management program, or if they experience pressure from customers and partners. Consider these drivers and existing governance structures as a foundation upon which to grow and refine more formal digital ethics practices.
Business and tech leaders constantly work toward better ethical practices

It’s easy to think that digital ethics are only a concern for large tech companies.

But thanks to years of focus on digital transformation and accelerated change due to the pandemic, virtually all companies are now tech companies. And even as we look ahead to the hope of declining coronavirus infections, we’ve adopted new ways of engaging in work and commerce that will not simply revert to previous norms. With these irreversible changes and a growing reliance on digital engagement, it’s more important than ever to understand and address the ethical implications of our technical innovation.

Avanade’s Global Digital Ethics Survey: Understand what’s working and how to improve

To gauge how companies are dealing with digital ethics, Avanade surveyed 800 business and IT leaders from six industries in eight countries. We asked them about their firm’s approach to digital ethics, results they may be seeing and future plans. For context, we also asked about their organization’s top tech spending priorities and conditions that may be driving them to adopt better digital ethics practices.

Across the entire response base, the top three priorities for tech spending were to:
- Improve operational effectiveness
- Improve customer engagement and experience
- Improve customer health and safety

Among the drivers that might affect respondents’ approaches to digital ethics, the most common were:
- A defined set of corporate values
- Heavy regulatory oversight with respect to customer interaction and data
- Heavy regulatory oversight with respect to products

So in aggregate, we see companies primarily implementing tech to improve operations with an eye toward customers, and they’re guided by corporate values with an eye toward regulators.
Companies are guided by corporate values with an eye toward regulators

How well do these statements describe your organization?

![Culture drivers chart]

Source: Avanade

Note: Some category totals may not equal 100% due to rounding.
Different approaches to digital ethics reflect different owners in the organization

Questions often arise about who in the organization should own digital ethics, because ownership can greatly influence approach and priority.

Reflecting an overwhelming tendency to see this as a technical issue (rather than, for example, a legal or marketing issue), respondents were by far most likely to name the IT organization as owning ongoing responsibility for digital ethics – at 34%. We would expect IT to play a major role in digital ethics, of course, as IT departments are usually involved in all stages of the tech development and procurement lifecycles. However, there’s a risk that if IT leaders don’t have strong support for digital ethics across the C-suite, they might find it difficult to guide how other functions – such as sales, legal, marketing, finance, HR and operations – address digital ethics concerns.

The next two most common functions to have ongoing responsibility for digital ethics were board of directors (12%) and marketing (11%), the former suggesting a high degree of attention across the organization, the latter suggesting either just surface-level attention or a specific focus on issues like privacy.

Of course, responsibility for digital ethics looks different from one industry to another. For example, healthcare organizations, most of which have already dealt formally with ethics questions related to patient care, were the most likely to have digital ethics responsibility assigned to an executive committee (16%). By comparison, only 7% of retail respondents said they have an executive committee responsible for digital ethics, whereas CEO and board of directors were both higher on the list for retail, at 16% each.

Ethics in action

Make it clear that this isn’t just a tech issue

There’s a risk that if IT leaders don’t have strong support for digital ethics across the C-suite, they might find it difficult to guide how other functions address critical concerns. If this is the case, you’ll have to demonstrate to each function how digital ethics supports their core objectives. For example, it can help marketing build and maintain brand value, help HR recruit and retain better talent, and help legal reduce investigations and lawsuits.
IT is most likely to own responsibility for digital ethics

Digital ethics ownership by industry

Source: Avanade
Note: Some category totals may not equal 100% due to rounding.
The state of digital ethics

Employee training tops the list of digital ethics tactics

Approach to digital ethics

- We train individuals to make good decisions. 48%
- We address digital ethics comprehensively across the organization. 45%
- We hire ethical individuals and expect them to make good decisions. 44%
- We assign individuals specific responsibilities. 40%
- We apply digital ethics efforts to certain projects as concerns arise. 35%
- We have some teams that have taken it upon themselves to address digital ethics. 35%
- We have an individual or individuals whose primary job is digital ethics. 31%
- We have a designated digital ethics team. 30%
- We have a defined digital ethics governance structure. 21%
- We contract with third-party service partners to help guide our digital ethics efforts. 10%

Digital ethics tactics differ

While strategic objectives and approaches to digital ethics might depend on the responsible party, there are also tactical differences in how these parties apply digital ethics in their organizations.

The most common tactic reported was training employees to make better ethical decisions, cited by 48% of respondents. By comparison, only 30% of respondents said their firm has a dedicated digital ethics team, and only 21% said their firm has a digital ethics governance structure in place.

It’s clear that more training is essential. In a recent Avanade/LinkedIn poll, we asked “What percentage of your organization do you estimate knows what digital ethics is?” Only one-third of the 1,225 respondents said half or more of their organization was familiar with digital ethics.

Source: Avanade
Note: Some category totals may not equal 100% due to rounding.
Digital ethics should align with company operations and culture

Digital ethics tactics can largely depend on what drives the organization to practice “good” behavior.

For example, a company is much more likely to conduct employee ethics training if it has defined corporate values (51% vs. 30%), a robust risk management program (52% vs. 32%), heavy regulation with respect to internal processes (52% vs. 39%), or heavy regulation with respect to customers and data (51% vs. 38%).

Respondents were also more likely to say their firm addresses digital ethics comprehensively across the organization if they had a defined set of corporate values (48% vs. 30%), if they had a robust risk management program (48% vs. 34%), or if they had experienced pressure from customers and partners to meet explicit standards (48% vs. 36%).

Here we start to see how certain corporate characteristics shape the way digital ethics efforts unfold in the organization. Rather than a simple matter of industry or regulatory requirements, a company’s approach to digital ethics might hinge on whether it has had a significant recent risk event, whether it competes largely on price or brand, or what kind of pressure it gets from customers and partners to meet explicit standards. It’s with such nuances in mind that business and tech leaders should mold their own digital ethics efforts around company operations and culture, not necessarily any notion of industry best practices.

Ethics in action

Align ethics practices to existing business success metrics

A company’s approach to digital ethics might hinge on whether it has had a significant recent risk event, whether it competes largely on price or brand, or what kind of pressure it gets from customers and partners to meet explicit standards. Digital ethics practices will struggle unless they have a direct line to key corporate success metrics.
Corporate characteristics drive digital ethics tactics

How does your organization address digital ethics?

We train individuals to make good ethical decisions.

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<td>Heavily regulated – customers and data</td>
<td>Yes</td>
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<td>Heavily regulated – internal processes</td>
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<td>No</td>
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<td>Robust risk management</td>
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<td>Defined corporate values</td>
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We address digital ethics comprehensively across the organization.

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<tr>
<td>Customer and partner pressure</td>
<td>Yes</td>
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<td></td>
<td>No</td>
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<tr>
<td>Robust risk management</td>
<td>Yes</td>
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<tr>
<td>Defined corporate values</td>
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Source: Avanade
Note: Some category totals may not equal 100% due to rounding.
Executives offer mixed reviews on the quality of their digital ethics efforts

To gauge how well companies are addressing digital ethics, we asked survey respondents to rate their firms’ performance with respect to the categories in Avanade’s Digital Ethics Assessment Framework.

The framework is a comprehensive catalog of digital ethics considerations that might arise for any specified project, product or system. Its purpose is to guide business and tech professionals through an evaluation of what ethical issues are most relevant, how well they’re addressing them and how they might improve their ethical standing. The categories, or considerations, fall into four domains:

- **Individual impacts**: with considerations including accessibility, privacy, physical health and mental health
- **Societal impacts**: with considerations including impact on politics, education, the workforce and the economy
- **Environmental impacts**: with considerations including energy use, materials use, pollution and impact from obsolescence
- **Programmatic factors**: with considerations like explainability, transparency, oversight and accountability
On average, for each consideration, just over 5% of survey respondents said their firms are performing so poorly that they see negative business consequences, while another 18% said their firms could be doing better. But importantly, our framework also evaluates positive ethical practices, and on average for each consideration, 33% of respondents said their firms are handling the issue well, while another 35% said their firms are handling the issue well enough to see positive business results. (The next section explores the most common business benefits of digital ethics.)

Uncovering risks and gaps

How should we interpret these results? A positive score does not necessarily mean the company is free from concern related to a particular issue, and a negative score doesn’t necessarily mean the company is ethically suspect. However, we can take away important insights by comparing responses from one issue to the next. For example, business and tech leaders are more likely to give their firms negative scores for both digital accessibility and inclusion than for privacy-related considerations, including data collection, data use and data control.

By comparison, we also see relatively high marks for addressing considerations such as access controls and reliability. Evaluating these kinds of relative differences between issues in your own organization can help you uncover ethical risks and gaps to remediate as well as strengths to highlight.

It’s also interesting to understand differences in responses according to geographic region (among other organizational demographics). For example, on the issue of how well their firm’s culture sets the tone for ethical technology decisions, 9% of respondents from the U.K., France and Germany said their firms are performing so poorly that they experience negative business consequences, compared with only 2% from the U.S. and Canada with that same response.

Again, this is not necessarily a judgment that North American firms are more ethical, nor that European firms are more sensitive to ethical missteps; it’s rather a recognition that conversations about digital ethics will likely feel different from one region to the next, possibly even among colleagues from the same firm working in different regions. If you’re conducting a similar survey of your executives, a good follow-up question would be: “Can you give an example of a behavior or outcome that elicited that response?”
Identifying digital ethics strengths and gaps

How well does your organization address these issues?

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<tr>
<th>Individual impacts</th>
<th>4%</th>
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<tr>
<td>Accessibility (e.g., for people with hearing or sight impairments)</td>
<td>7%</td>
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<td>How inclusive technology is for diverse populations (e.g., for ethnic minorities, under-represented populations)</td>
<td>5%</td>
<td>22%</td>
<td>7%</td>
<td>34%</td>
<td>31%</td>
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<td>How technology affects people’s mental health and well-being</td>
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<td>How technology affects people’s physical health and safety</td>
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<td>How technology respects children’s rights and protections</td>
<td>6%</td>
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<td>How technology respects people’s personal time and attention</td>
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<td>How technology respects people’s free speech</td>
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<td>How technology affects people’s financial health</td>
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<td>How technology respects people’s personal dignity and agency (e.g., ability to make decisions for themselves)</td>
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<td>Privacy: How we use personal data to make decisions about people (e.g., microtargeting, variable pricing)</td>
<td>6%</td>
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<td>31%</td>
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<td>Privacy: Who accesses, owns and controls personal data (e.g., user preferences, right to be forgotten)</td>
<td>6%</td>
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<td>Privacy: What personal data we collect and how (e.g., surveillance, user consent)</td>
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Source: Avanade
Note: Some category totals may not equal 100% due to rounding.
Customer loyalty, employee satisfaction and customer satisfaction are **key benefits of digital ethics**

When we talk about the costs and benefits of digital ethics, we should understand that these will be different from one company to the next.

Your executives may even see digital ethics as part of the organization’s efforts to be a responsible business, regardless of cost. But whatever factors drive digital ethics efforts, when we asked respondents how their firms measure the value of digital ethics, the top three responses were customer satisfaction, customer loyalty and employee satisfaction.

Among a number of interesting differences across geographies and industries, employee satisfaction was the top answer in Japan and Germany, while for energy companies, partner loyalty was much higher on the list than for any other industry (second only to customer loyalty). Of the choices given, respondents were least likely to associate digital ethics with a decrease in risk events and costs or a decrease in production and operating costs. Although for mid-level managers, a decrease in risk events and costs was among their top five measures.

Once again, it’s clear that digital ethics will look different and yield different results from one organization to the next. And that makes it all the more important that you take the time to articulate why digital ethics is worthwhile for your business.

**Truly committing to the practice**

The perceived value from digital ethics can best be seen by future commitments of time and money. A third of survey respondents said they expect their firm to continue current efforts and investments for the next 12 months, while over 60% said they plan to increase efforts and investments (only 5% expected a decrease). Respondents from financial services firms were most likely (70%) to expect an increase, while even the least likely industry (manufacturing) still had 57% of respondents say they expect an increase.

When we asked how they would invest their increased budget and resources, respondents in all countries said they were most likely to increase training for employees, except for the respondents from the U.K., who were more likely to say they plan to adopt new digital ethics tools and technologies. Beyond training, respondents from Germany were most likely to say they’ll hire employees with digital ethics expertise, and those from Japan said they plan to install more formal digital ethics governance. Meanwhile, respondents from Canada were more likely than those in other countries to say they’d engage with third-party experts.
How to measure the value of digital ethics

Choose top five

- Increased customer satisfaction
- Increased customer loyalty
- Increased employee satisfaction
- Increased employee loyalty
- Decrease in user issues and/or complaints
- Increased partner loyalty
- Higher tech download/adoption rates
- Decrease in risk events and/or costs
- Decrease in production and operational costs

Source: Avanade
Note: Some category totals may not equal 100% due to rounding.
Companies expect to invest more in digital ethics

Budget expectations for the next 12 months by industry

Ethics in action

Investments are on the rise

A third of survey respondents said they expect their firm to continue current digital ethics efforts and investments for the next 12 months, while over 60% said they plan to increase efforts and investments. While tech and business leaders on the receiving end of larger budgets might consider adopting new tools and technologies or even hiring new employees to focus on digital ethics, leaders without larger budgets can still see real change with less expensive initiatives like employee training and workshops.

Source: Avanade
Note: Some category totals may not equal 100% due to rounding.
Recommendations

Reconsider your commitment and renew your focus.

Knowing that good digital ethics practices require ongoing effort and investment, how do we build on the early momentum our survey data describes? Examining the data, three key factors emerge that should help any business or tech leader strengthen the digital ethics practices in their organization:

**Define your digital ethics practices in the context of your business**

Even a cursory look at our data shows substantial differences in how companies address digital ethics and why. While this benchmarking data provides a valuable reference point against which to gauge your own digital ethics efforts, keep in mind that none of these efforts will see success unless they align with your organization’s business objectives, corporate values, operations and culture, rather than any notion of industry best practices.

For example, a team looking to drive consumer adoption of a mobile app might prioritize an easy-to-understand privacy policy and use customer satisfaction as key success metrics, while a team rolling out a new system for employee collaboration might prioritize training related to inclusivity and anti-harassment and use engagement metrics to measure success.

**Start with awareness, then add structure**

While we can appreciate respondents’ optimism about their digital ethics efforts, it’s worth noting that fewer than half of them said their firms are training staff to make better ethical decisions, and far fewer had dedicated staff or a governance structure for digital ethics. Training is rightfully at the top of the list of tactics and the area most likely to receive investment over the next year – after all, dedicated teams and governance structures can’t always be there to guide employees’ decisions.

However, soon after the awareness and skills that come from training, companies should be working to formalize their digital ethics efforts so they can evaluate current status, improve processes and demonstrate results. For example, you may choose to track the number of projects that receive a digital ethics review every month as well as common ethical concerns or gaps that might suggest a need for more targeted training.

**Discuss and celebrate your digital ethics bright spots**

Throughout the survey, respondents noted dozens of digital ethics considerations around which their firms are experiencing positive business results, and more than half of respondents noted positive benefits related to customer and employee engagement from their efforts. Even if we apply healthy skepticism about these results, it’s clear that business and tech leaders see good things happening in their organizations.

With that in mind, we should all be talking to each other much more often about how doing digital ethics well can be good for business, just as we should continue asking how ethical gaps and failures can be bad. This communication may include informal discussion about highlights and concerns during team meetings or employee check-ins, or you may consider more formal communication such as employee newsletters or executive roundtables covering pressing ethical concerns.
Let us **help you**

Practicing good digital ethics is increasingly important for any business, but making it work for your business can be tricky and take time.

**Contact us** to help you with your ethics journey, whether you’re looking for an in-depth assessment of a project or product, if you need help with employee training and awareness, or if you’re interested in advice on ethics frameworks and governance models.

For more information about digital ethics and other trends that will impact you and your business over the next 12 to 18 months, visit us at [Avanade Trendlines](#).
Survey details

Avanade’s Global Digital Ethics Survey respondents were C-level and senior executives as well as managers in business and technology roles. All respondents represented firms ranging from 1,000 to over 100,000 employees and ranging from $500 million to over $5 billion USD in revenue. The primary industries covered were Consumer Goods and Services, Energy, Financial Services, Healthcare, Manufacturing and Retail. Respondents resided in Australia, Brazil, Canada, France, Germany, Japan, United Kingdom and the United States.