MAPPING THE TECH GENOME
WHAT WILL DRIVE TECH PROFESSIONALS IN 2020?
About the survey

2,088 respondents
one of the largest tech studies in the world

72 countries
from the UK to Australia

110 different job titles
CTO to software developer
In 2003, an international team of scientists completed one of the most ambitious research programmes ever accomplished: to map the human genome – the very biological code that makes up all humans.

Inspired by their ambition, for this seventh edition of the Harvey Nash Technology Survey, we have asked a very big question ourselves: What makes a technologist tick? From stress and work/life balance to developing skills and careers, this report covers some of the most important factors that make up a tech person’s career.

Thank you to everyone who took part (more than 2,000 of you): your input has led us to uncover fascinating insights about the community we all operate in.

We hope you find it useful.
TECH PEOPLE IN 2020...

Consider their company a ‘tech’ company

- Mostly male
  - 78% male
  - 21% female
  - 1% n/a

Mostly male

- 58% tech company
- 42% non-tech company

Expect to change role soon

- 50% <1 year
- 28% 2-3 years
- 22% >3 years

Are happy in their work

- 60% happy
- 17% unhappy
- 24% neither

Many began their career outside tech

- 35% came from outside tech
- 65% have always been in tech

Care about pay & work/life balance

- Top three factors in looking for a new job:
  - 59% pay
  - 40% work/life balance
  - 30% flexible working

Are entrepreneurial

- 23% have already started a company
- 10% plan to

Are stressed

- 16% are currently concerned about mental health
- 34% have been in the past

Work hard

- 40% work 41–50 hours a week
- 15% work 51+ hours a week

Continually refreshing skills

- 29% expect their skills to be out of date within 3 years
- 60% within 6 years

Are stressed

- 34% have been in the past

Better balance

- 78% balance pay with work/life
- 21% rely on one

Continually refreshing skills

- 29% expect their skills to be out of date within 3 years
- 60% within 6 years

MAPPING THE TECH GENOME
The changing shape of tech

The massive expansion of all-encompassing tech has transformed tech teams and tech talent. Almost six in ten tech workers say their company is now a ‘tech’ company. Tech teams are increasingly focused on customer experience, no-code platforms, automation and flexible working.

An age of constant reskilling

Almost three in ten expect their current skills to stop being attractive to employers within three years. That proportion rises to six in ten within six years. Testers and Operations feel the most pressure to keep their skills up to date. The roles where there is least pressure to update skills are the ones that require human skills rather than technical skills, such as management and programme management roles.

Stress is common

Half of respondents have been concerned about their mental health due to work, either in the past or – as one in six (16%) report – right now.

No one would pretend that working in the tech sector is a walk in the park, of course. But for it to be pushing half its workers into a state of mental health concern was a surprise for us, and also a worry.

Cross-training into tech is common

Over a third of technologists came from outside the sector, and in the case of Business Analysis and Business Intelligence almost half were not originally technologists. Even in highly technical roles like Software Engineering, almost one-fifth cross-trained.

Attracting tech talent

It’s all about pay and flexible working. The top three factors were: pay (59%), work/life balance (40%) and flexible working (30%). It’s only when we get past these that we begin to see factors that relate directly to the company or job role: working on innovative projects, company culture and a good boss.

Does social purpose have a purpose?

Only one in ten consider social purpose one of their top three factors in choosing a job. However, organisations that have a social purpose perform much better on retaining their people. Women and people in their twenties are most likely to value social purpose.
What will a tech job look like in ten years’ time?

Ten years ago if you were asked to think of a typical tech worker, chances are it would be a person sitting in a corporate IT department whose ‘customers’ were the internal business users.

In the last decade we have seen an incredible change in the role of technology and technologists. What began as a back-office function has broken free of its roots and crept into almost every place imaginable throughout the enterprise. Increasingly, organisations are calling themselves ‘tech companies’.

What is interesting about these tech companies is just how externally focused they are; if you work for one you are almost twice as likely to see your customer as the end external customer rather than as an internal business user (76% versus 40%).

The focus is increasingly on customer experience (CX), regardless of ‘who’ the customer is. Businesses have realised that technology is not a tool in the tool box, it is the tool. And the impact on internal IT staff will be profound. The skills required are different, the attitude is different and what’s delivered is different.

Ten years from now? Chances are internal IT won’t be identifiable from today and most IT services will be provided from global tech companies like Amazon, Google, Microsoft, etc. Will all companies be technology companies? Will all customers be end customers? Maybe not, but there is no doubt that this is the direction of travel.
As technology progresses, more layers are being built between the technologists and the hardware on which the technology they manage runs.

One thing that has significantly deepened this ‘layering’ has been cloud computing. It has driven technology adoption well beyond the technology team, and the prevalence of low-code / no-code platforms, some backed by major brands like Salesforce and Microsoft, has brought the power of software development directly into the hands of the masses. In fact, if you look inside a modern marketing department today, much of the customisation of customer-facing systems that would have been carried out by software developers in the past is being performed by marketing executives today.

Are marketers technologists then?

Well, in a way yes. Because even the definition of a technology job is changing.

But low-code / no-code platforms are not the death of the software developer. It doesn't take long before these platforms get complex and need technical expertise, especially in how they are stitched together. Also, enterprises looking for the competitive edge very often find it comes from creating handcrafted, bespoke innovations.

Forward-thinking organisations are using low-code / no-code to build their tactical technology, and software developers to craft their competitive edge.

Over one-third (37%) of tech experts believe their job will be affected significantly by automation in the next decade, of whom 7% believe that effect is happening right now – especially in testing, infrastructure and operations.

It’s a very significant trend.

But things might not be quite as they seem. For instance, perhaps you would expect over time the grey area of this chart (jobs being automated right now) to expand to eat up the blue area (jobs expected to be automated in the future).

But, having tracked automation for the last three years, we are seeing that this is not the case; in fact, the proportion of roles being affected by automation is actually down.

What this data doesn’t show, of course, is that while some jobs are being destroyed, others are being created. The sector is spawning entirely new job roles, some within the tech team, others outside it, and many with exotic titles...the world of technology jobs is in a state of flux, but what it isn’t doing is shrinking. Technologists need to ‘double down’ on what makes them different from machines: dealing with complexity, creativity, and working with other humans are the skills of the future.
The future is flexible

Agree or disagree? The biggest growth in tech jobs will be ‘gig’ / freelance work

Almost half of respondents believe that the biggest growth area in technology jobs will be in flexible, non-employed, work.

Connected to this is the highly entrepreneurial nature of tech workers. Some 23% have been involved in some kind of start-up venture, a further 10% have concrete plans to do so, and a whopping 48% would seriously consider it if the opportunity arose.

There will always be a place for permanent workers – especially ones who are focused on the core activity such as developing the intellectual property of an organisation; but, increasingly, organisations are using outsourcing and flexible labour to build scale as well as to access hard-to-find skills.

Who works harder?

**Dieter.**
Although it’s pretty close. 55% of Dieter’s age group (45–49) work over 40 hours a week, compared to 47% of Jade’s age group (25–29).

Who cares about their company’s ‘purpose’ most?

**Jade.**
25% of her age group would only choose an employer if they believed in its social purpose; for Dieter’s group it’s 14%.

Who’s happiest at work?

**Jade.**
70% of her age group are happy, compared to 60% of Dieter’s.

Who’s most concerned about their age?

**Dieter.**
43% of his age group believe their age is holding their career back. For Jade’s age group it’s just 8%.

Who’s most stressed?

**Jade.**
Just – 20% of her age group have a mental health concern right now. For Dieter it’s a little lower at 16%.

*Names and locations for the ‘Head to head’ sections are fictional and for illustrative purposes only. The data presented here has been filtered solely on the third criterion listed, in this instance age groups.*
Skills don’t last forever

Almost three in ten expect their current skills to stop being attractive to employers within three years. That proportion rises to six in ten within six years.

Being in tech is a tough game, and while technology evolves, so do the skills required to be successful in the sector.

How long do you expect your skill set to be useful for?

<table>
<thead>
<tr>
<th></th>
<th>0-1 year</th>
<th>2-3 years</th>
<th>3-4 years</th>
<th>5-6 years</th>
<th>6+ years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Testing</td>
<td>43%</td>
<td>22%</td>
<td>35%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT Operations</td>
<td>36%</td>
<td>37%</td>
<td>27%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Analysis</td>
<td>35%</td>
<td>28%</td>
<td>38%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developer</td>
<td>34%</td>
<td>33%</td>
<td>32%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Architecture</td>
<td>31%</td>
<td>38%</td>
<td>31%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Software Engineering</td>
<td>29%</td>
<td>39%</td>
<td>32%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Global Average</td>
<td>29%</td>
<td>31%</td>
<td>40%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Intelligence / Analytics</td>
<td>28%</td>
<td>26%</td>
<td>47%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Management</td>
<td>28%</td>
<td>31%</td>
<td>41%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Development Management / Team Leadership</td>
<td>26%</td>
<td>35%</td>
<td>38%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Infrastructure Management / Team Leadership</td>
<td>23%</td>
<td>42%</td>
<td>35%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CIO, CTO or VP of IT</td>
<td>22%</td>
<td>30%</td>
<td>48%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Programme Management</td>
<td>19%</td>
<td>34%</td>
<td>47%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Testers and Operations feel the most pressure to keep their skills up to date. This surprised us a little as we were expecting Software Engineering closer to the top of the chart.

The roles where there is least pressure to update skills are the ones that require human skills rather than technical skills, such as management and programme management roles.
Switching careers into technology

Over a third come from outside the sector

What did you do before you went into a career in technology?

<table>
<thead>
<tr>
<th>Role</th>
<th>I have always been in technology</th>
<th>I switched from another career, but worked closely with technology/technology people</th>
<th>I switched from another career that was totally unrelated to technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Software Engineering</td>
<td>84%</td>
<td>5%</td>
<td>11%</td>
</tr>
<tr>
<td>Development Management / Team Leadership</td>
<td>79%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Developer</td>
<td>78%</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Architecture</td>
<td>77%</td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td>CIO, CTO or VP of IT</td>
<td>77%</td>
<td>15%</td>
<td>9%</td>
</tr>
<tr>
<td>Infrastructure Management / Team Leadership</td>
<td>73%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Testing</td>
<td>71%</td>
<td>18%</td>
<td>11%</td>
</tr>
<tr>
<td>Global Average</td>
<td>65%</td>
<td>20%</td>
<td>15%</td>
</tr>
<tr>
<td>IT Operations</td>
<td>59%</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>Project Management</td>
<td>56%</td>
<td>28%</td>
<td>16%</td>
</tr>
<tr>
<td>Programme Management</td>
<td>55%</td>
<td>30%</td>
<td>15%</td>
</tr>
<tr>
<td>Business Intelligence / Analytics</td>
<td>52%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>Business Analysis</td>
<td>51%</td>
<td>29%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Over a third of technologists came from outside the sector, and in the case of Business Analysis and Business Intelligence almost half were not originally technologists. Even in highly technical roles like Software Engineering, almost one-fifth cross-trained.

It paints a picture of opportunity. Even in the most technical roles, it’s possible to carve out a successful tech career from the outside.
Are technologists lukewarm to purpose?

When considering a job opportunity, how important to you is the social purpose of your prospective employer?

- **Very important, I would not work for a company without a social purpose I believe in**: 14%
- **Quite important, but it’s one of a number of factors**: 60%
- **Not important, it would not affect my decision to work for that employer**: 26%

In 2018 Larry Fink, the world-renowned investor, published an open letter to the world explaining how organisations simply won’t survive without a clear social purpose.

While plenty of commentators have talked about ‘purpose’, what was special about this letter was who wrote it: the head of an investment company with direct control over one of the world’s largest investment funds ($1.7tm, in case you were wondering).

Many lauded this as a game-changing moment where organisations were finally about to ‘get the social thing’.

Two years later we’ve asked tech experts about their own view on social purpose, and the response is, at best, lukewarm.

While clearly social purpose does matter at least to some extent to 74% of respondents, only one in seven (14%) fall into the ‘Larry Fink’ category of believing that it is critical and that it would fundamentally affect their decision-making. Only one in ten consider social purpose one of their top three factors in choosing a job.
Gen Z, millennials and women think differently

When considering a job opportunity, how important to you is the social purpose of your prospective employer? Very important

When you factor in age we do see some significant differences. If you are in your twenties (so a Gen Z or young millennial), you are significantly more likely to feel social purpose as critical than any other age group.

What will be interesting to see is how this changes over time. In five years’ time will the peak of interest in social purpose demonstrated by 25–29 year olds be carried with them as they move into the 30–34 age bracket? Or will they get there and when faced with mortgages, marriage and settling down, change their perspective? The likelihood is that it will be a bit of both.

Gender is also a factor: women are 50% more likely to value social purpose as critical in choosing a job role (20% versus 13%). As more women enter the tech workforce (although the glacial pace at which it is happening is another point altogether), will this begin to affect the overall role of social purpose?

While social purpose does not appear to be a leading factor in attracting talent, when you take the 37% of organisations that are most serious about it and compare them to the rest, things start to get interesting.

Workers for organisations with a high social purpose (that is, where workers believe they are serious about their social purpose to a ‘great extent’) are over half as much more likely to be happy in their job as workers in companies that are only serious about their social purpose to ‘some extent’ (78% versus 52%). They are also almost twice as likely to believe their organisation is a ‘force for good’ (79% versus 45%).

Perhaps most significantly, they are more likely to stay in their job. Only 40% of workers for ‘high social purpose’ organisations expect to move in a year, while for the rest this increases to 56%. That’s a big difference, and when hiring costs / opportunity costs can amount to tens of thousands of pounds, dollars or euros it can make a difference to the bottom line.

In short, social purpose does have a purpose. And, comforting news for the accountants, one of its purposes is to save money!
Don’t worry, be happy? Work and stress

Half of tech workers have been concerned by stress

Have you ever been concerned about the state of your mental health due to working pressures?

- Yes, I currently am: 16%
- Yes, in the past: 34%
- No: 50%

Most people will have experienced waking up early one morning and shuddering a little about work. Perhaps there is a big presentation to make, or a difficult conversation to be had.

For the most part this stress is all part of working life, and sometimes gives us the necessary ‘push’ to get a job done.

But sometimes that shudder reaches more widely, more deeply and lasts much longer – detaching from its original cause. This is where stress turns into distress, and begins to affect mental health.

And judging by respondents to the Tech Survey, a significant proportion of you are experiencing it. Half of respondents have been concerned about their mental health due to work, either in the past or – as one in six (16%) report – right now.

No one would pretend that working in the tech sector is a walk in the park, of course. But for it to be pushing half its workers into a state of mental health concern was a surprise for us, and also a worry.
Who’s experiencing stress?

Currently concerned about state of mental health, by job title

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Concerned Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT Operations</td>
<td>20%</td>
</tr>
<tr>
<td>Architecture</td>
<td>18%</td>
</tr>
<tr>
<td>Testing</td>
<td>16%</td>
</tr>
<tr>
<td>Infrastructure Management / Team Leadership</td>
<td>16%</td>
</tr>
<tr>
<td>Global Average</td>
<td>16%</td>
</tr>
<tr>
<td>Business Analysis</td>
<td>15%</td>
</tr>
<tr>
<td>Development Management / Team Leadership</td>
<td>15%</td>
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<tr>
<td>Developer</td>
<td>15%</td>
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<td>Software Engineering</td>
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<td>11%</td>
</tr>
<tr>
<td>Programme Management</td>
<td>10%</td>
</tr>
</tbody>
</table>

You are most likely to be concerned by your mental health if you:

- 23% work 60+ hours per week
- 21% work for a very small company (revenue <$1m)
- 20% work in IT Operations
- 20% work in Retail or Leisure

So what are the causes of stress? Well, the single most quoted factor was being short of staff. This is not a surprise, as our sister research project, the Harvey Nash /KPMG CIO Survey, reports that 67% of organisations are being held back by a skills shortage, and the existing tech team seem to be making up for that shortfall.

Moving down the list of stress factors, what is most striking is that there is no really clear leader as a secondary cause for stress. Stress comes from a wide variety of places: what is stressful for one person may be the fascinating challenge for another. Stress is a personal thing.

Causes of stress:

- 38% We’re short on staff, so I’m covering more than one job
- 29% We’re currently working on a particularly complex project
- 28% Our executive team doesn’t understand the time needed to develop, pilot and implement a new technology
- 24% The balance of ‘keeping the lights on’ with developing new innovative technologies is a heavy burden
- 22% ‘Always on’ technology (such as work emails on my phone) doesn’t allow me to switch off
- 21% Technology being driven outside the technology team (i.e. business managed IT) is creating a lot of issues / additional work
- 17% The technology lead in our business isn’t a good manager
- 15% We don’t invest enough in external specialists to help us deliver large digital projects
Organisations are relatively supportive when it comes to mental health issues, with three-quarters having at least some kind of support in place, and a third (34%) being classed as ‘very supportive’.

What is striking is just how strong a correlation there is between mental health wellness and how supportive an organisation is. Organisations ‘unsupportive’ on mental health are almost three times more likely to have people who are concerned about their mental health right now than ‘very supportive’ ones.

There is also a very similar correlation between how flexible an employer is on working arrangements: very inflexible ones are three times more likely than highly flexible ones to have workers with mental health issues (30% versus 10%).

Organisations can make a difference

How supportive is your organisation with helping workers with mental health issues?

Very supportive - e.g. there is formal support in place
Unsupportive - e.g. there is nothing in place
Quite supportive - e.g. there is informal support

Who’s most likely to have started their career outside tech?
Julia.
42% of women began their career outside the sector compared to 33% of men.

Who cares about their company’s ‘purpose’ most?
Julia.
20% of women would only choose an employer if they believed in its social purpose; for men it’s 13%.

Who thinks small companies are better than big companies most?
Jason.
40% of men believe this. For women only 26% agree believe this, and a larger proportion (29%) believe that bigger companies are better.

Who’s happiest at work?
It’s a draw!
Exactly 59% of both men and women consider themselves happy.

Who believes big tech companies like Facebook should be broken up most?
Jason.
32% of men think this, as opposed to 22% for women.
Attracting and retaining tech talent

Show me the money

Which factors are most important to you when looking for a new job?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay</td>
<td>59%</td>
</tr>
<tr>
<td>Work/life balance</td>
<td>40%</td>
</tr>
<tr>
<td>Flexible working</td>
<td>30%</td>
</tr>
<tr>
<td>Location / commute</td>
<td>28%</td>
</tr>
<tr>
<td>Innovative projects / working with new tech</td>
<td>28%</td>
</tr>
<tr>
<td>Company culture / team</td>
<td>27%</td>
</tr>
<tr>
<td>Career prospects</td>
<td>25%</td>
</tr>
<tr>
<td>Boss</td>
<td>23%</td>
</tr>
<tr>
<td>Opportunities for training / personal development</td>
<td>18%</td>
</tr>
<tr>
<td>Social purpose - having an impact on society</td>
<td>11%</td>
</tr>
<tr>
<td>Employer / brand</td>
<td>3%</td>
</tr>
</tbody>
</table>

If someone tells you that culture and social purpose are the most important things when looking for a job, you are in the presence of a very rare person indeed, because the 2020 Technology Survey places ‘pay’ very, very firmly in that number one position.

It’s a rather brutal conclusion, especially for a sector where many organisations make a big play on how their mission is to change the world, but there is no doubt that one of the sector’s biggest attractions is how it rewards people.

That said, it is clearly not the only factor and, our research tells us, for most people pay only matters to the extent that they feel they are paid a ‘fair worth’ for their skills, at which point other factors become more important.

The next most important factors centre around the personal life of that person: work/life balance, flexible working, location.

It’s only when we get past these that we begin to see factors that relate directly to the company or job role: working on innovative projects, company culture and a good boss.

It suggests that to attract people the key factors need to be to show people how that job will work with their own personal life, not just how amazing the job is itself.
People join for one reason and leave for very different ones

Why did you leave your last job?

Why did you leave your last job?

What is very clear is that the reasons why people leave are very different from the reasons they joined. The top two reasons – ‘career prospects’ and ‘boss’ – only come in at #7 and #8 in the reasons to be attracted to a job.

The picture this paints is that people start looking for a new job because they feel their career has gone as far as it can go, and this is often tied up with their engagement with their boss. This is the ‘push’; but the ‘pull’ is very different.
Where are the women?

We ask it every year. And while many organisations have implemented diversity and inclusion programmes, they seem to be making little difference to the gender balance.

We can’t think of a career that is more satisfying, better paid and potentially world-changing than tech. We need to work harder at getting this message out to everyone.

### Proportion of tech team who are women

<table>
<thead>
<tr>
<th>Year</th>
<th>Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>17%</td>
</tr>
<tr>
<td>2017</td>
<td>16%</td>
</tr>
<tr>
<td>2018</td>
<td>15%</td>
</tr>
<tr>
<td>2019</td>
<td>15%</td>
</tr>
<tr>
<td>2020</td>
<td>17%</td>
</tr>
</tbody>
</table>

### Which company has the largest chance of a job being automated?

**Big company**

32% of respondents from big companies believe their job will be automated in the next decade, compared to 27% from small companies.

### Which is most able to retain its staff?

**Small company**

57% of staff expect to stay more than a year, compared to 49% for large companies.

### Which is most serious about social purpose?

**Big company**

41% of people working for big companies believe they are serious about their social purpose to a great extent, compared to 28% for small companies.

### Which is most likely to have taken people from outside tech?

**Big company**

9% of tech people in small companies originally started their career outside tech, compared to 32% for large companies.

### Which has the happiest staff?

**Big company**

62% report they are happy, compared to 56% for small companies.
What do tech workers believe in?

Facebook’s Libra not getting many ‘likes’

A surprise to us: we thought tech people would be a little more cynical. Unsurprisingly, Healthcare and Education are the most ‘good’; and Financial Services and Construction / Engineering least good.

It appears that smaller organisations are preferred, but not by that much. And, in fact, if you work for a large company you are more likely to disagree with this statement than agree with it. The bottom line is that company size doesn’t seem to matter too much – there are advantages and disadvantages to both.

The almost third/third/third split here is tantalising. Older workers are much more likely to think that such companies should be split up. If you are female you are less likely to think so.

This one is quite categorical – almost no one is interested in Libra, no matter how you cut the data. We would like to add a caveat to this, though. People weren’t that fanatical about Facebook at the very start – ‘Why would anyone want to see images of cats dancing?’ – and at least in theory a global currency could be a very, very good idea. The challenge is trust (see next section).

Perhaps not a surprise. We analyse this in more detail on page 8 but, needless to say, flexible working is alive and kicking in tech.
To what extent do you respect these brands?

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<th>To some extent</th>
<th>Little / no extent</th>
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<tr>
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<td>43%</td>
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<tr>
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<tr>
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</table>

If the last section hinted that Facebook might have an image problem, here we see it face to face – Facebook is the least respected brand among technologists. Only one in ten (12%) respect it to a ‘great extent’, one-quarter of the proportion who respect Microsoft or Google (both 48%).

It’s interesting to see Microsoft’s positioning in this chart. As recently as five years ago many were predicting its demise, but its cloud strategy and greater openness appear to have served it well. This survey, for instance, is being written on a Mac, running a Chrome browser, using MS’s cloud version of Word.

Of course, while people often group these companies together, they all do very different things – especially when you look at their underlying business and which parts are really making money. But what unites them is their all-consuming desire to own the customer experience, and their focus – verging on fanaticism – on data.

Maybe they began their life doing one thing (Amazon, for instance, selling books). But, in their pursuit of the customer experience, they are growing to be large, sprawling enterprises. Amazon, for example, is now a film company, online retailer, physical retailer, grocer, insurance provider, market maker, technology manufacturer and IT services company (I’m sure we’ve missed something). They are so good at building systems that they are able to sell those services externally – for instance, Amazon Web Services generates revenues of USD30bn+ and now accounts for around 13% of Amazon’s revenues. It is awesome.

And in many ways it is hugely helpful for humanity. It helps connect, helps inform and provides access to services and technology previously unimaginable. But for some, the ownership of data, and adverts or news announcements that ‘spookily’ pop up seemingly knowing what you are thinking, can be just a little scary.

Which company is most likely to have entrepreneurs?
Social Solutions
27% of staff have set up a company in the past, compared to 21% for Unsociable Ltd.

Which is most likely to have managers causing stress?
Unsociable Ltd
20% of staff working for these companies report poor management as a top 3 stress factor, compared to 10% for Social Solutions.

Which is most likely to employ women in tech?
Social Solutions
19% of people working for these companies are women, compared to 8% for Unsociable Ltd.

Which is most likely to have stressed employees?
Unsociable Ltd
21% report they are currently concerned about their mental health, compared to 13% for Social Solutions.

Which is most likely to take on people from outside the sector?
It’s a draw!
Both are just as likely, with around 35% of tech staff beginning their career outside the sector.
Visit the Tech Survey Microsite

Download charts, behind the scenes data, comments and discussion.

www.harveynash.com/techsurvey
### What are you worth?

#### Permanent Salary (global data)

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## Contract Day Rate (global data)

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