



Perspective: IDC Health Insights' Top 5 Preferred Life Science Technology Vendors for 2011

PERSPECTIVE #HI229400
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IN THIS PERSPECTIVE

This IDC Health Insights Perspective discusses results from the 3Q11 *Leading Indicators in Life Science IT Spending Survey*, which polled 135 industry leaders on which life science vendors they plan to spend money with over the next 12 months.

Background

IDC Health Insights recently completed its 3Q11 *Leading Indicators in Life Science IT Spending Survey*, a biannual IT budget tracking survey of several hundred life science companies. The survey, which polled 135 industry leaders on planned IT budgetary spend, technology priorities, and vendor preferences, asked participants to identify which vendors servicing the life science market they expect to spend money with on software, hardware, and IT services over the next 12 months.

Survey Results

Hardware

Dell continued to hold a large lead in the hardware category, with 47.8% of respondents expecting to purchase hardware from Dell over the next 12 months. This is up from 42.2% last year. HP maintained its second place ranking from last year's survey with 32.2% (up significantly from just 23% last year).

However, this year's largest gainer was Apple, which moved into the top 3 for the first time. Apple jumped to third place from its previous fifth spot, nearly doubling its score from 14.8% last year to 27.8% this year. This further illustrates our previous findings that the iPad is helping Apple become a dominant player in the life sciences, as outlined in *Perspective: Apple Quickly and Quietly Becoming a Major Player in Pharma Sales and Marketing Technology* (IDC Health Insights #HI227972, April 2011). IBM and Cisco tied for fourth place, both with 22.6% of respondents planning to spend on hardware with them over the next 12 months.

Software

Oracle led all enterprise software companies by a wide margin, with 29.6% of life science companies planning to spend on its software within the next 12 months. This is up from 25.2% last year. SAP maintained the number 2 spot with 15.7% (up from 12.6% last year), and SAS rounded out the top 3 with 10.4% (down from 11.9% last year). Microsoft and Apple tied for fourth place, each with 9.6%. Historically, this survey question had asked about *all* software, whereas this year, it was rephrased to ask specifically about *enterprise* software (which excludes standard *desktop* software like MS Office). For this reason, Microsoft's score has changed significantly, as reflected by Tables 1–4.

IT Services

Accenture secured the number 1 spot this year for the first time in our survey's history, with 7.8% of respondents expecting to contract with Accenture during the next 12 months for IT services. IBM maintained its second place ranking with 7% (down from 7.4% last year), and HP placed third with 4.3% (falling from first place last year with 8.9%). Overall, all IT services numbers seemed to be down slightly relative to last year's numbers. IMS placed fourth with 2.6% (making its first appearance on our list), and Cognizant placed fifth with 1.7% (now placing in the top 5 two years straight).

The top 5 vendors in each category are listed in Table 1. For comparative purposes, rankings from the three previous years are shown in Tables 2–4.

TABLE 1

Top 5 Life Science Vendors, 2011

Q. Which vendors are you most likely to spend money with during 2011?

Ranking	Hardware		Software		IT Services	
	Vendor	% of Respondents	Vendor	% of Respondents	Vendor	% of Respondents
1	Dell	47.8	Oracle	29.6	Accenture	7.8
2	HP	32.2	SAP	15.7	IBM	7.0
3	Apple	27.8	SAS	10.4	HP	4.3
4	IBM	22.6	Microsoft	9.6	IMS	2.6
5	Cisco	22.6	Apple	9.6	Cognizant	1.7

n = 135

Source: IDC Health Insights' *Leading Indicators in Life Science IT Spending Survey*, 3Q11**TABLE 2**

Top 5 Life Science Vendors, 2010

Q. Which vendors are you most likely to spend money with during 2010?

Ranking	Hardware		Software		IT Services	
	Vendor	% of Respondents	Vendor	% of Respondents	Vendor	% of Respondents
1	Dell	42.2	Microsoft	54.8	HP	8.9
2	HP	23.0	Oracle	25.2	IBM	7.4
3	Cisco	14.8	SAP	12.6	Accenture	6.7
4	Apple	14.8	SAS	11.9	Capgemini	5.9
5	IBM	14.1	Symantec	10.4	Cognizant	5.2

n = 135

Source: IDC Health Insights' *Leading Indicators in Life Science IT Spending Survey*, 2010

TABLE 3

Top 5 Life Science Vendors, 2009

Q. Which vendors are you most likely to spend money with during 2009?

Ranking	Hardware		Software		IT Services	
	Vendor	% of Respondents	Vendor	% of Respondents	Vendor	% of Respondents
1	Dell	52.7	Microsoft	53.3	IBM	10.8
2	IBM	28.1	Oracle	22.2	Accenture	6.0
3	HP	25.1	SAP	12.0	HP	5.4
4	Cisco	16.8	Symantec	10.2	Capgemini	3.0
5	Apple	13.8	SAS	9.0	Deloitte	3.0

n = 172

Source: IDC Health Insights' *Leading Indicators in Life Science IT Spending Survey, 2009***TABLE 4**

Top 5 Life Science Vendors, 2008

Q. Which vendors are you most likely to spend money with during 2008?

Ranking	Hardware		Software		IT Services	
	Vendor	% of Respondents	Vendor	% of Respondents	Vendor	% of Respondents
1	Dell	45.4	Microsoft	57.3	IBM	12.5
2	HP	31.5	Oracle	24.7	Accenture	6.8
3	IBM	31.4	SAS	18.0	HP	6.1
4	Apple	18.6	Symantec	14.0	SAIC	5.7
5	Cisco	17.3	SAP	12.8	CapGemini	4.8

n = 154

Source: IDC Health Insights' *Leading Indicators in Life Science IT Spending Survey, 2008*

Note: Rankings are based on the percentage of life science companies planning to purchase goods and/or services from the vendors listed previously. Rankings do not reflect dollar size or volume of purchases.

The *Leading Indicators in Life Science IT Spending Survey* provides biannual guidance on life science IT spending trends, technology priorities, and vendor preferences, segmented by company size, industry subsegment, organization type, and functional area. The survey is part of IDC Health Insights' Life Science Business Systems Strategy service. For further information on data from this survey, please refer to *Life Science Leading Indicators 3Q11* (IDC Health Insights #HI229401, July 2011).

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Related Research

- *Life Science Leading Indicators 3Q11* (IDC Health Insights #HI229401, July 2011)

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