

AWARD REPORT AND FINDINGS

IDC 2023 Cloud CSAT Award for Life Sciences

Presented to Google, November 2023

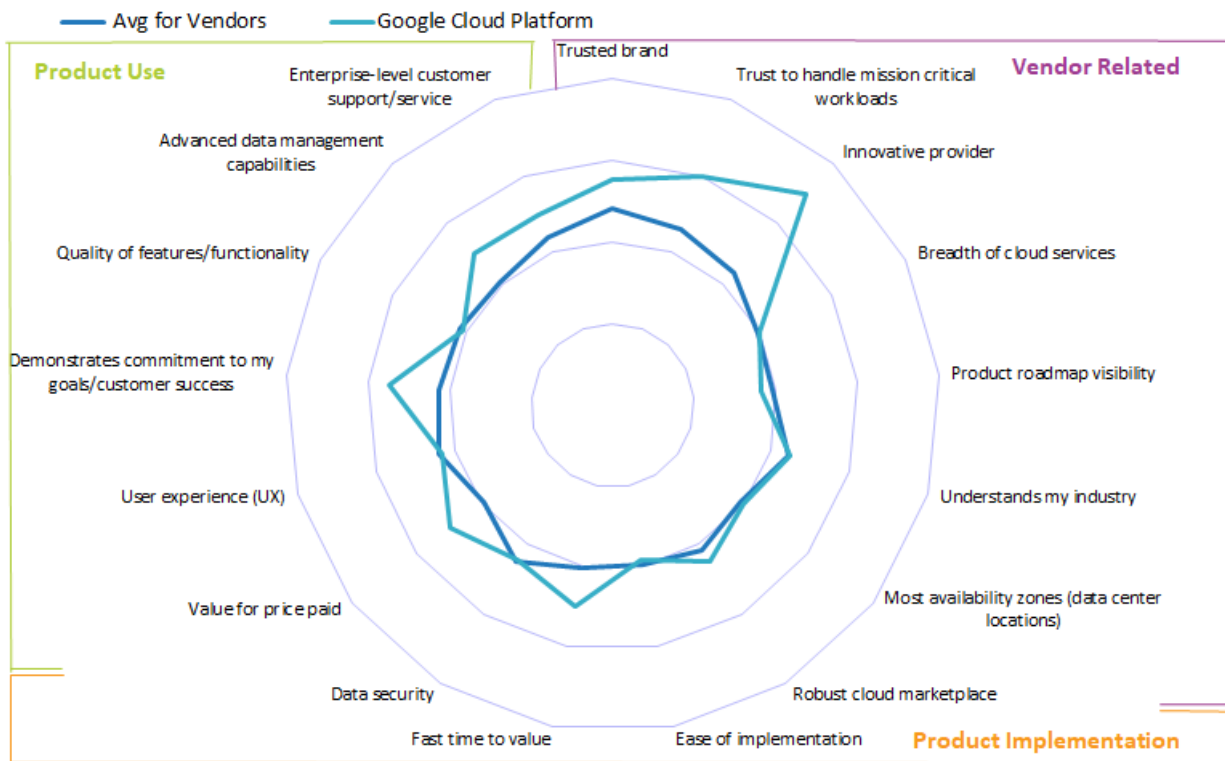
Based on ratings collected in IDC’s 2023 Industry Cloud Path Survey, Google Cloud Platform received the highest scores for infrastructure-as-a-service (IaaS) vendors serving the life sciences market and has been awarded IDC’s 2023 Cloud Award for Life Sciences Customer Satisfaction.

IDC’s customer satisfaction award program, the CSAT Awards, recognizes the leading infrastructure-as-a-service (IaaS) vendor in each industry who receives the highest customer satisfaction scores based on IDC’s Industry Cloud Path survey. Industry Cloud Path is a global survey of more than 2,100 organizations across all geographic regions and company sizes, where customers are asked to rate their vendor on 31 different customer satisfaction metrics.

How Customers Rate Google Cloud Platform

Figure 1 shows how Google Cloud Platform scored in each of the customer satisfaction categories, relative to the overall average scores in each category across all vendors that were reviewed. The inner line represents the overall group averages, while the outside line depicts Google Cloud Platform scores.

FIGURE 1: Google Cloud Platform Customer Satisfaction Ratings vs. Average Ratings for IaaS Vendors



Source: IDC Industry Cloud Path Survey, 2023

IaaS Evaluation and Trust

Infrastructure-as-a-services providers are delivering substantial value to their clients and have increasingly taken on a leading role in strategic technology discussions with their clients. Consequently, to ensure they select the correct long term strategic partner, customers are placing growing emphasis on how they evaluate and select cloud services providers.

More than 2,100 companies using IaaS were asked what they believe are the 3 most important criteria when selecting a provider. Data security was by far the top criteria cited, followed by the quality of features and overall brand trust placing in second and third place respectively. Interestingly, when double clicking on brand trust, companies said the top 3 principles that determine vendor trust for them are, once again, security placing first, reliability in second, and transparency in third. Other factors also mentioned include regulatory compliance, brand longevity, and social responsibility.

While the business case for IaaS remains strong and clear, customers across all IaaS providers do cite certain areas where they seek improvements. The most common challenges mentioned by customers include lack of change management support, poor product roadmap transparency, poor availability of training, and unpredictable costs. IaaS providers can take note of these areas and self-evaluate whether these are capabilities they could double down on to deliver even greater value to their customers.

What's Behind IDC's Cloud Award Program

Industry Cloud Path provides deep insight into how each industry is moving to the cloud for 36 industry segments, including Healthcare (payers-US only, providers-US only, pharma, biotech, medical devices, CROs), Manufacturing (discrete, process, aerospace & defense, automotive, industrial products & equipment, high tech, CPG, chemicals, paper mills, metals & materials, Transportation & Logistics), Wholesale Distribution, Financial Services (banking, insurance, capital markets), Retail, Energy (oil & gas, power utilities, water utilities, gas utilities), Government (federal-US only, state & local-US only), Education (K-12 US-only, Higher Education), Hospitality & Food Service (includes commercial travel), Media & Entertainment, Telecommunications and Professional Services.

Coverage includes overall adoption, application migration strategy and timing, drivers & inhibitors, budgeting trends, purchasing preferences, attitudes toward buying channels, vendor ratings & advocacy scores, behavioral trends, and cloud adoption and buying intentions for 300+ industry-specific applications.

The Industry Cloud Path survey is conducted across all geographic regions of the world, all company sizes, includes roughly 67% IT leaders and 33% line of business leaders, and its respondent base ranges from senior managers up through chief executive officers (CXOs). All respondents go through an extensive screening process to ensure they are familiar with the technologies they are being asked about, are current users, and have influence on their company's technology buying decisions. Further, all customer satisfaction metrics and ratings are collected solely from current customers of the vendors being rated, to ensure the scoring reflects up-to-date customer sentiment based on proper vendor familiarity and knowledge. Each customer is asked to rate their primary application vendor on 31 different metrics, including 17 customer satisfaction metrics (see Table 1) and 14 vendor vulnerability categories (see Table 2). These 30 metrics, detailed below, span across 3 main categories of review, including the vendor itself and its relationship with the customer, several aspects of the product's implementation, and a broad range of assessment examining the product's usage and value. All these satisfaction and vulnerability metrics are aggregated and analyzed to identify the vendors with the highest overall customer satisfaction scores in each vertical market.

Table 1: Customer Satisfaction Metrics

Q. Based on your experiences, rate Google Cloud Platform as your primary IaaS vendor. Please use a 0-10 scale where 0 is 'Poor' and 10 is 'Excellent'.

Customer Satisfaction Metrics	
1	Trusted brand
2	Value for price paid
3	Ease of implementation
4	User experience (UX)
5	Fast time to value
6	Quality of features/functionality
7	Innovative provider
8	Product roadmap visibility
9	Understands my industry
10	Enterprise-level customer support/service
11	Most availability zones (data center locations)
12	Data security
13	Trust to handle mission critical workloads
14	Breadth of cloud services
15	Demonstrates commitment to my goals/customer success
16	Advanced data management capabilities
17	Robust cloud marketplace

Table 2: Vendor Vulnerabilities

Q. Which of the following issues has your organization experienced with Google Cloud Platform as your primary IaaS vendor? Select all that apply.

Vendor Vulnerability Metrics	
1	Difficult implementation and deployment
2	Difficult integration
3	Poor customer service
4	Poor availability and uptime
5	Difficult migrating services and data
6	Lack of visibility into vendor operations
7	High costs and fees
8	Unpredictable costs
9	Data loss or breach
10	Lack of change management support
11	Unsatisfactory features
12	Poor user experience
13	Poor availability of training
14	Lack of product roadmap transparency

About the Analysts



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