

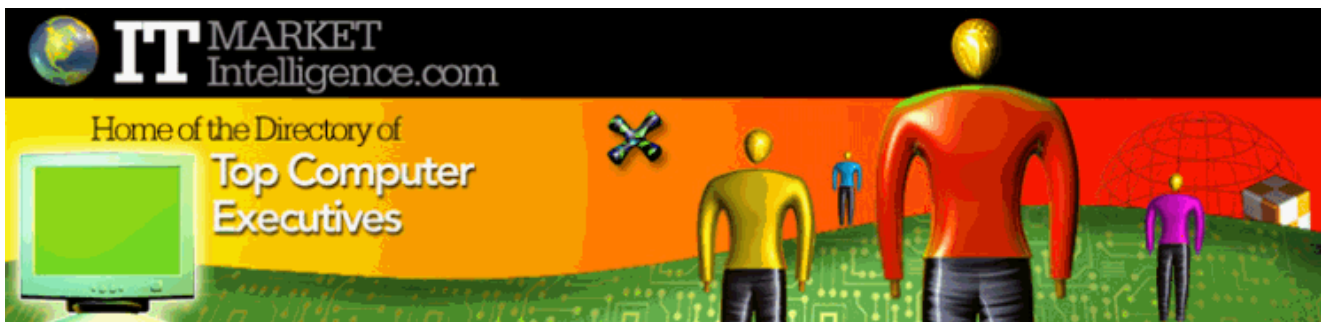
Identifying Information Technology Markets:

A Reference to Demographic Characteristics for Information Technology Market Planners

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Introduction

This report explores some of the underlying demographic characteristics that make the information technology market particularly unique. All IT departments are not created equal, but there are ways to overcome this obstacle by understanding these unique market characteristics. An understanding of the key demographics in the IT industry, and how they can be correlated to general business demographics if needed, is key to achieving comprehensive market coverage.

Those responsible for market identification, sizing, and segmentation will find this data revealing and educational. This report is not meant to explain its practical application in detail, but rather simply introduce the subject and report the data. A more detailed tutorial on market segmentation, *Understanding IT Market Characteristics: Market Identification and Segmentation Techniques for Today's Informed Marketing and Sales Professional*, is also available at www.itmarketintelligence.com/mo-reports.htm.

At the very root of this subject are two particularly important and compelling issues to understand if you are interested in accurate market identification and segmentation:

Size does not matter: The key to marketing IT related products is not generally organization size, but rather the size of the IT organization or the end-user population. Each industry sector has a relatively consistent rate of automation based on the needs of that industry. A \$1 billion manufacturing company will spend, on average, about \$20 million on IT. A \$1 billion financial services organization will spend, on average, about \$80 million on IT. The mere fact that an organization has a certain amount of revenue or headcount does not have a direct correlation to the overall amount of IT adoption or deployment. Hence, business size doesn't matter; what matters is being able to identify IT size related demographics or using business size demographics in an IT specific meaningful way.

Rate of data fill: If your target prospect is a company with 250 or more deployed PCs, and your data vendor only has the number of PCs in 80% of their records, you'll be missing 20% of the market because the PC data is not available. To compensate for missing data like this, another data field such as number of employees can be used to capture additional prospects. An understanding of how different demographic characteristics statistically relate to each other will help identify the most effective set of demographic characteristics that can be used for a project.

The statistics and some calculated data in this report are based on averages. If you are in the process of creating a comprehensive demographic model to be presented in testimony before Congress (or a project of similar importance), please call us for references to statistical modeling experts.

Notice to IT managers: This data is not meant to be benchmark data for IT departments. Please call for references to quality sources of IT department benchmark data.

Table 1: Ratio of Deployed PCs to Total Employees - Summary

Data is read as 1 PC per nn employees

Industry	Ratio	N=
Banking	1:1.49	322
Education	1:0.79	2013
Financial svcs	1:1.52	526
Government	1:1.48	2267
Healthcare	1:2.05	2048
Insurance	1:1.55	687
Manufacturing	1:2.59	8279
Not for Profit	1:1.99	449
Retail	1:5.20	2027
Services	1:2.28	3592
Transportation	1:3.72	568
Utilities	1:2.04	497

Source: Applied Computer Research, Inc.¹

This ratio can be applied to either total PCs or to the total number of employees to calculate the other characteristic. Using banking as an example, there is 1 PC per 1.49 total employees. If we are targeting banks with 500 or more PCs, we can multiply 500 PCs by 1.49 employees to learn that a banking organization with 750 employees will have, on average, 500 PCs.

Table 2: Ratio of Deployed PCs to Total Employees - Detailed

Data is read as 1 PC per nn employees

Industry	Ratio	N=
Bank, commercial	1:1.49	322
Education, higher	1:0.72	1784
Education, K-12	1:1.13	229
Financial svcs	1:1.52	526
Govt, federal	1:1.47	496
Govt, local	1:1.67	897
Govt, provincial	1:1.43	178
Govt, state	1:1.30	696
Healthcare facilities	1:2.03	1826
Healthcare services	1:2.14	222
Insurance	1:1.55	687
Mfg, aerospace & defense	1:2.87	305
Mfg, agriculture	1:3.96	107
Mfg, biotech	1:2.03	389
Mfg, chemicals	1:2.61	334
Mfg, construction	1:3.30	485
Mfg, construction components	1:3.66	201
Mfg, construction materials	1:3.15	157
Mfg, electronics	1:2.13	255
Mfg, food	1:4.06	565
Mfg, forest products	1:3.34	212
Mfg, furniture	1:3.70	193
Mfg, industrial	1:2.80	512
Mfg, IT hardware	1:1.53	99
Mfg, media	1:1.64	566
Mfg, minerals	1:2.79	370
Mfg, packaging	1:3.38	169
Mfg, personal products	1:2.55	196
Mfg, printing	1:2.66	116
Mfg, software	1:1.30	352
Mfg, textiles	1:3.78	300
Mfg, tools & equipment	1:2.14	1840

Mfg, vehicles & vehicle parts	1:3.75	518
Mfg, watercraft	1:3.38	38
Organization, service	1:2.38	321
Organization, special interest	1:1.17	128
Retail, entertainment	1:3.70	212
Retail, industrial	1:2.03	137
Retail, lodging	1:4.99	261
Retail, restaurant	1:4.39	252
Retail, shopping	1:4.75	1165
Svcs, aerospace & defense	1:2.61	55
Svcs, biotech	1:1.52	54
Svcs, business	1:2.12	486
Svcs, engineering	1:1.83	221
Svcs, foodservice	1:7.18	22
Svcs, industrial	1:3.27	129
Svcs, infrastructure	1:6.12	200
Svcs, IT	1:2.05	405
Svcs, lease,rent	1:2.73	68
Svcs, legal	1:1.11	203
Svcs, library	1:1.13	37
Svcs, marketing	1:1.86	223
Svcs, personal	1:4.38	102
Svcs, real estate	1:2.55	155
Svcs, research	1:1.27	64
Svcs, wholesale	1:2.43	1168
Trans, facilities	1:1.80	45
Trans, freight	1:3.70	387
Trans, passenger	1:4.29	112
Trans, pipeline	1:3.62	24
Utility, communications	1:3.07	130
Utility, electric, gas & water	1:1.88	335
Utility, power generation, trans	1:1.29	32

Source: Applied Computer Research, Inc.¹

Table 3: Ratio of IT Employees to Deployed PCs - Summary

Data is read as 1 IT employee per nn PCs

Industry	Ratio	N=
Banking	1:20.72	323
Education	1:48.11	2084
Financial svcs	1:16.48	558
Government	1:25.52	2475
Healthcare	1:34.18	1982
Insurance	1:11.30	697
Manufacturing	1:27.74	8216
Not for Profit	1:21.85	470
Retail	1:23.96	1914
Services	1:24.88	3520
Transportation	1:22.93	563
Utilities	1:16.65	507

Source: Applied Computer Research, Inc.¹

This table shows the ratio of IT employees to deployed PCs. This ratio can be used to estimate the number of IT employees or deployed PCs simply based on the other characteristic. Using banking as an example, there is 1 IT employee per every 20.72 deployed PCs. If we are targeting banks with 500 or more PCs, we can divide 500 PCs by 20.72 PCs to learn that a banking organization with 500 PCs will have, on average, 24 IT employees.

The overall average is 26.5 deployed PCs for each IT employee. This includes all vertical markets, so attention needs to be paid to the variations in the ratios for each vertical market.

Table 4: Ratio of IT Employees to Deployed PCs - Detailed

Data is read as 1 IT employee per nn PCs

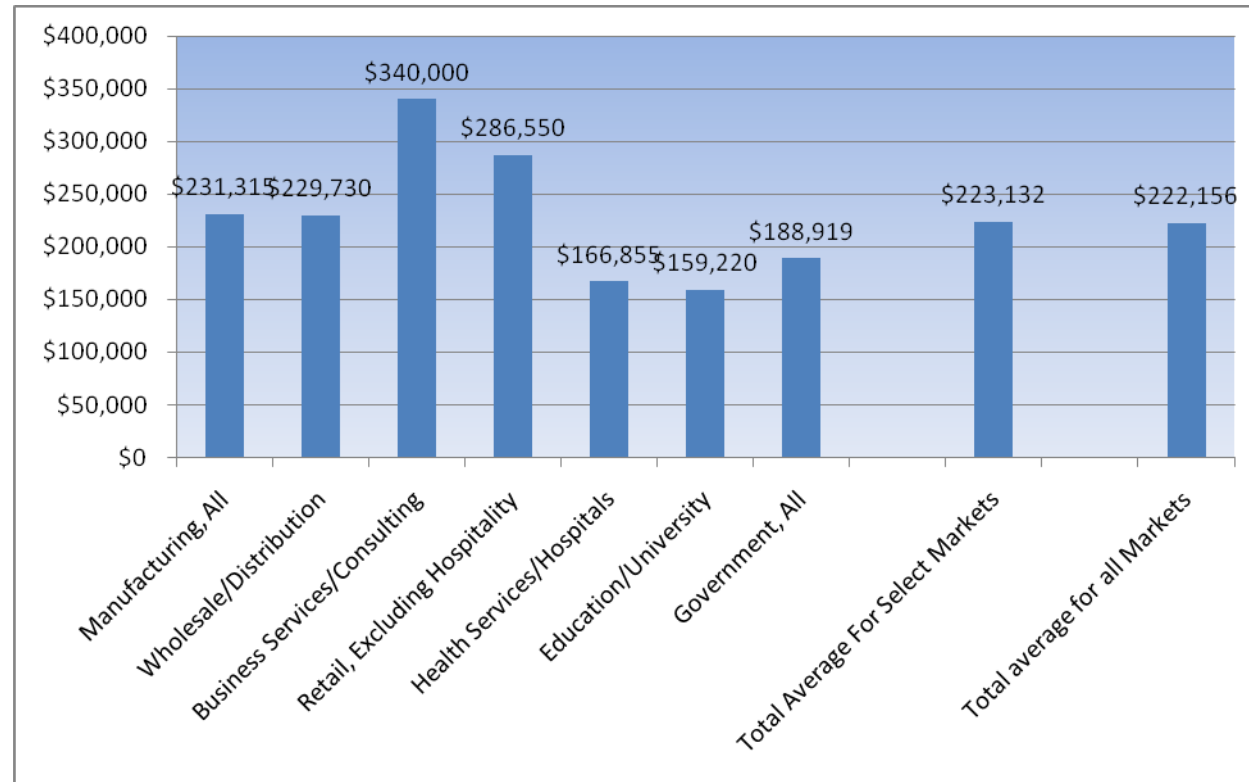
Industry	Ratio	N=
Bank, commercial	1:20.72	323
Education, higher	1:47.46	1900
Education, K-12	1:56.48	184
Financial svcs	1:16.48	558
Govt, federal	1:22.52	608
Govt, local	1:33.69	911
Govt, provincial	1:20.47	188
Govt, state	1:21.69	768
Healthcare facilities	1:34.18	1778
Healthcare services	1:32.91	204
Insurance	1:11.30	697
Mfg, aerospace & defense	1:31.20	306
Mfg, agriculture	1:26.86	108
Mfg, biotech	1:25.94	414
Mfg, chemicals	1:27.05	332
Mfg, construction	1:37.53	454
Mfg, construction components	1:24.66	199
Mfg, construction materials	1:29.70	150
Mfg, electronics	1:28.61	270
Mfg, food	1:22.53	551
Mfg, forest products	1:33.50	204
Mfg, furniture	1:27.65	190
Mfg, industrial	1:32.55	485
Mfg, IT hardware	1:27.29	106
Mfg, media	1:23.04	569
Mfg, minerals	1:29.83	369
Mfg, packaging	1:29.95	161
Mfg, personal products	1:17.37	202
Mfg, printing	1:24.19	106
Mfg, software	1:27.34	381
Mfg, textiles	1:21.06	302
Mfg, tools & equipment	1:31.36	1822

Mfg, vehicles & vehicle parts	1:29.84	496
Mfg, watercraft	1:39.62	39
Organization, service	1:27.93	320
Organization, special interest	1:13.91	150
Retail, entertainment	1:31.64	207
Retail, industrial	1:36.84	128
Retail, lodging	1:28.45	250
Retail, restaurant	1:24.38	236
Retail, shopping	1:20.54	1093
Svcs, aerospace & defense	1:26.53	51
Svcs, biotech	1:26.36	54
Svcs, business	1:21.35	476
Svcs, engineering	1:41.54	210
Svcs, foodservice	1:21.71	18
Svcs, industrial	1:32.31	119
Svcs, infrastructure	1:25.83	186
Svcs, IT	1:18.41	377
Svcs, lease,rent	1:22.64	69
Svcs, legal	1:27.81	204
Svcs, library	1:32.43	49
Svcs, marketing	1:23.98	219
Svcs, personal	1:21.47	93
Svcs, real estate	1:33.08	150
Svcs, research	1:18.84	65
Svcs, wholesale	1:24.63	1180
Trans, facilities	1:17.92	51
Trans, freight	1:22.54	382
Trans, passenger	1:25.67	105
Trans, pipeline	1:16.61	25
Utility, communications	1:16.14	124
Utility, electric, gas & water	1:17.29	350
Utility, power generation, trans	1:24.01	33

Source: Applied Computer Research, Inc.¹

Table 5: IT Budget Dollars Per IT Employee

Data only available for select industries.

Source: Applied Computer Research, Inc.²

ACR tracked IT budget data for a number of years, but finally abandoned the effort realizing that accurate money numbers are hard to come by. Unless you're interviewing the actual CIO, too many interviewees simply make guesses. Using the average IT budget dollars per IT employee is a good way to calculate the number of IT employees based on an IT budget. If the target market is organizations with a \$5 million IT budget, the number of IT employees would be calculated by dividing \$5 million by \$222,000, which comes to 22.5 IT employees.

Table 6: Percent of Gross Revenue Devoted to IT Budget by Industry

Industry	% of Revenue
Banking/Finance	8
Education	NA
Government	NA
Healthcare	4
Insurance	3
Manufacturing	2-5
Retail	2
Services	1-4.3
Telecom	5
Transportation	2
Utilities	2

Source: Adapted from the InformationWeek 500³

In terms of IT dollars, a manufacturing organization that grosses \$1 billion per year will, on average, invest \$20 million into their IT function. A financial services firm with a comparable \$1 billion annual gross revenue will, on average, invest \$80 million into their IT function. Financial services firms invest over four times more into IT than do manufacturing organizations. This illustrates that general business size demographics do not have a direct correlation to an organization's investment in IT. \$1 billion in gross revenue doesn't differentiate between the two extremes of this example.

Market segmentation by organization size is common and often focused on gross revenue or total employment. Understanding the relationship between various types of size data will contribute valuable information to market segmentation efforts. Gross revenue per employee can be used to calculate the total number of employees for a given revenue size.

Table 7: Gross Revenue Per Employee by Vertical Market

Adapted from the Fortune 1000, *Fortune Magazine*, April 18, 2005, and the Fortune 500, *Fortune Magazine*, May 4, 2009. www.fortune.com.

Industry Classification	Average Income per Employee for 2004 (4/18/05 issue)	Number of Companies in Sample for 2004	Average Income per Employee for 2008 (5/14/09 issue)	Number of Companies in Sample for 2008	Sample of Companies in this Category
Advertising/Marketing	\$155418	3	\$179849	2	Omnicom Grp, Interpublic Grp
Aerospace & Defense	241387	15	297271	12	Northrop Grumman, Honeywell, Boeing
Airlines	231983	11	321676	6	Delta, Southwest, Continental
Apparel	223993	11	331030	3	Nike, VF, Polo
Auto Retailing Svcs	665143	7	550507	8	Autonation, Carmax, Avis
Beverages	308274	8	289918	6	Coca-Cola, Pepsi, Molson
Bldg Materials/Glass	304745	6			Owens Corning, Vulcan, Armstrong Holdings
Chemicals	425628	37	565408	17	Dow Chemical, Dupont, Ashland, Praxair
Commercial Banks	319336	34	436783	20	CitiGroup, Wells Fargo, U.S. Bancorp
Computer & Data Svcs	194558	20			EDS, Unisys, Ebay, Fiserv, Earthlink
Computer Peripherals	305681	6	248991	2	EMC, Western Digital
Computer Software	415226	10	460107	3	Microsoft, Oracle, Symantec
Computers/Office Equipment	390855	9	440301	7	Hewlett-Packard, Dell, Xerox, Sun, Apple
Construction & Farm Machinery			445429	6	Caterpillar, Deere, Terex
Diversified Financials	404221	11	610109	8	GE, Fannie Mae, AON, Ameriprise
Diversified Outsourcing Svcs	65497	9	84109	2	Aramark, ADP
Private Education	108663	2			Apollo Group, Career Education
Electronics/Electrical Equipment	174179	14	229689	4	Emerson, Whirlpool, Rockwell
Energy	1056002	20	1413650	11	Constellation, Calpine, American Electric
Engineering & Construction	189819	12	277074	10	Fluor, EMCOR, Jacobs Engineering
Entertainment	383719	10	424839	6	Time Warner, Disney, Viacom, CBS
Financial Data Svcs			450370	7	First Data, Visa, Fiserv, Sungard Data Sys
Food Consumer Products	233160	20	334717	13	Sara Lee, Conagra, Dole, Hershey, Kellogg
Food Production	334214	7	497978	4	Tyson, Pilgrim's Pride, Archer Daniels

Food Services	47201	11	54769	4	McDonald's, Starbucks
Food & Drug Stores	205357	19	272689	10	Kroger, Albertson's, Rite Aid, GNC
Forest & Paper Products	363226	9	445674	4	International Paper, Weyerhaeuser, Domtar
Furniture	157465	6			La-Z-Boy, Leggett & Platt, Herman Miller
General Merchandisers	168231	17	181270	10	Wal-Mart, Target, Sears, Kohl's
Health Care: Ins & Managed Care	821034	13	1064619	9	UnitedHealth Grp, Aetna, Wellpoint, Cigna
Health Care: Medical Facilities	115830	16	166497	5	HCA, Tenet Healthcare, Davita
Health Care: Pharmacy/Other Svcs	735796	9	951995	4	Medco Health Solutions, Omnicare
Home Equipment, Furnishings	213484	5	263982	6	Masco, Newell Rubbermaid, Jarden
Home Builders	988533	15	1365387	3	Pulte Homes, Centex
Hotels, Casinos, Resorts	70915	9	85095	4	Marriott Intl, Harrah's, MGM
Household & Personal Products	315710	14	458598	6	Procter & Gamble, Kimberly-Clark, Avon
Industrial Machinery	229683	35	237952	7	Eaton, Parker Hannifin, Dover, Timken
Information Technology Svcs			225823	5	IBM, Computer Sciences, Unisys
Insurance: Life & Health (Mutual)	2173490	11	2363739	7	New York Life, Northwestern Mutual
Insurance: Life & Health (Stock)	793564	19	936015	7	MetLife, AFLAC, Prudential Fin, Unum Grp
Insurance: Property & Casualty (Mutual)	827612	7	920763	2	State Farm, Auto-Owners Ins
Insurance: Property & Casualty (Stock)	623436	34	455483	15	Berkshire Hathaway, Allstate, Travelers, USAA
Internet Svcs & Retailing			719796	5	Google, Amazon, Ebay
Mail, Package & Freight Delivery	106867	3	131500	2	United Parcel Service, FedEx
Medical Products & Equipment	250164	17	300243	5	Medtronic, Boston Scientific, Stryker
Metals	342229	14	554248	8	ALCOA, United States Steel, Nucor, AK Steel
Mining & Crude-Oil Production	961496	20	1266319	12	Occidental Petroleum, Devon, XTO, Peabody
Motor Vehicles & Parts	351553	29	401316	17	General Motors, Ford, Delphi, Tenneco
Network & Other Comm Equip	413340	11	487158	5	Motorola, Cisco Systems, Corning
Oil & Gas Equipment	227632	10	345195	7	Halliburton, Baker Hughes, BJ Services
Packaging & Containers	252527	14	357069	6	Smurfit-Stone, Crown Holdings, Ball
Petroleum Refining	2759053	13	4330000	13	Exxon Mobil, Chevron, Sunoco, Frontier Oil
Pharmaceuticals	399213	20	514796	11	Pfizer, Johnson & Johnson, Merck, Amgen
Pipelines	3510707	8	3387914	11	Plains All Amer, Targa Resources, El Paso
Publishing, Printing	203158	18	197396	3	McGraw-Hill, RR Donnelley & Sons
Railroads	256858	4	375254	4	Union Pacific, CSX, Norfolk Southern
Real Estate	656927	8	485485	4	Prologis, Host Hotels, Realogy
Savings Institutions	333655	4			Washington Mutual, Golden West, Westcorp
Scientific, Photographic & Control Equip	230085	7	298020	4	Eastman Kodak, Danaher, Thermo Fisher
Securities	718029	11	472483	6	Merrill Lynch, Franklin Resources, Blackrock

Semiconductors & Electronic Components	290707	24	339626	9	Intel, Texas Instruments, Micron Technology
Specialty Retailers	205761	66	250341	26	Home Depot, Costco, Gap, Foot Locker
Telecommunications	376915	25	438500	13	Verizon, AT&T, Qwest, DirectTV
Temporary Help	501797	6	628074	2	Manpower, Kelly Svcs
Textiles	156373	2			Mohawk Industries, Westpoint Stevens
Tobacco	377540	4	544549	3	Philip Morris, Altria Grp, Reynolds American
Toys, Sporting Goods	261321	2			Mattel, Hasbro
Transportation Equipment	274921	4	357669	2	Harley-Davidson, Brunswick
Transportation & Logistics	218348	10	408328	3	CH Robinson, Con-Way
Trucking, Truck Leasing	153817	9	182457	2	YRC Worldwide, Ryder System
Utilities: Gas & Electric	698023	52	896845	24	Exelon, FirstEnergy, Southern, Nisource
Waste Management	229132	3			Waste Mgmt, Allied Waste, Republic Svcs
Wholesalers: Diversified	429898	13	755979	7	Genuine Parts, Hughes Supply, True Value
Wholesalers: Electronics & Office Equip	942699	14	1670415	8	Ingram Micro, Tech Data, Avnet, Synnex
Wholesalers: Food & Grocery	531800	9	1160613	3	Sysco, Nash Finch
Wholesalers: Health Care	1745388	9	2551869	5	McKesson, Henry Schein, Cardinal Health
Miscellaneous	240514	6	281617	5	3m, Waste Mgmt, Mohawk Ind, Mattel
Total Average			417310		

Note: This data has been adapted directly from the *Fortune Magazine* issues. The 2004 data includes all 1000 companies, but the 2008 data only includes data for the Fortune 500. In most cases there is an increase in the revenue per employee, but in a few cases there is a decrease. There may be a number of reasons for the variance:

- The Fortune 500 from 2008 represents the largest 500 companies, so the variance may simply represent an economy of scale.
- With four years between the two *Fortune Magazine* issues the variance may represent natural growth.
- Fortune makes adjustments to the classification of companies, and some of the variances may be attributed to a different profile of companies in the samples.

As with the other data in this report, these averages are meant to provide a general guideline and more research may be in order for individual situations.

This table shows the dramatic range in revenue per employee for some individual companies. Although revenue or employment are appropriate demographics for segmentation in many cases, this data clearly illustrates there is no correlation between employment and revenue.

Table 8: Gross Revenue Per Employee – Company Examples

Reported in descending order by revenue per employee.

Adapted from the Fortune 500, *Fortune Magazine*, May 4, 2009. www.fortune.com.

Company	Revenue Per Employee	Industry
Enterprise GP Holdings	\$7882222	Pipelines
Conocophillips	6827337	Petroleum Refining
Exxon Mobil	4229713	Petroleum Refining
Oneok	3407212	Pipelines
Western Refining	3250303	Petroleum Refining
Mckesson	3091277	Wholesale: Heathcare
Tech Data	3005117	Wholesale: Electronics & Ofc Eqpt
Devon Energy	2829091	Mining, Crude-Oil Production
Freddie Mac	2475252	Diversified Finance
Occidental Petroleum	2353846	Mining, Crude-Oil Production
Express Scripts	2035397	Healthcare Pharmacy & Svcs
Constellation Energy	1942941	Energy
Cardinal Health	1913676	Wholesale: Heathcare
New York Life	1834618	Insurance: Life, Health (Mutual)
Mass Mutual Life	1520769	Insurance: Life, Health (Mutual)
Wellpoint	1427762	Healthcare Insur/Mngd care
Avnet	1402578	Wholesale: Electronics & Ofc Eqpt
Viacom	1271739	Entertainment
Dow Chemical	1247538	Chemicals
Pulte Homes	1186604	Home Builders
Legg Mason	1098104	Securities
Google	1077836	Internet svcs & Retailing
Unum Group	1018571	Insurance: Life, Health (Stock)
Apple	968077	Computers & Office Equip

MetLife	966404	Insurance: Life, Health (Stock)
Exelon	961703	Utilities: Gas & Electric
Amazon.com	925894	Internet svcs & Retailing
State Farm	895296	Insurance: Prop & Casual (Mutual)
Amgen	893036	Pharmaceuticals
Sysco	750440	Wholesale: Food & Grocery
Travelers Cos	741727	Insurance: Prop & Casual (Stock)
Duke Energy	723945	Utilities: Gas & Electric
Autonation	714400	Auto Retailing
Ford Motor	686746	Motor Vehicles & Parts
Costco	683802	Specialty Retailers
Microsoft	663956	Computer Software
Cigna	630396	Healthcare Insur/Mngd care
General Motors	613082	Motor Vehicles & Parts
Cisco	597922	Network & Comm Equipment
General Electric	567204	Diversified Finance
Johnson & Johnson	537043	Pharmaceuticals
Yahoo	530074	Internet svcs & Retailing
Fluor	530070	Engineering, Construction
Ebay	527222	Internet svcs & Retailing
Deere	501968	Construct & Farm Machinery
Progressive	495198	Insurance: Prop & Casual (Stock)
United States Steel	484776	Metals
American Express	482985	Banking Commercial
Motorola	471031	Network & Comm Equipment
Bank of America	465313	Banking Commercial

Intel	447986	Semiconductors & Electronic Cmps
Berkshire Hathaway	438007	Insurance: Prop & Casual (Stock)
Kraft Foods	437418	Food Consumer Products
Verizon Comm	434849	Telecommunications
Merck	432065	Pharmaceuticals
Qwest	409114	Telecommunications
Charles Schwab	402463	Securities
Advanced Micro Devices	401379	Semiconductors & Electronic Cmps
Kellog	395741	Food Consumer Products
Boeing	375518	Aerospace & Defense
Union Pacific	372497	Railroads
Abitibowater	369167	Forest & Paper Products
Hewlett-Packard	368735	Computers & Office Equip
Kimberly-Clark	366321	Household & Personal Products
Genuine Parts	363531	Wholesale: Diversified
National Oilwell Varco	356771	Oil & Gas Equipment Svcs
EMC	353349	Computer Peripherals
Coca-Cola	345714	Beverages
Medtronic	337875	Medical Products & Equipment
Molson Coors Brewing	336671	Beverages
Symantec	333750	Computer Software
Smurfit-Stone Container	330610	Packaging, Containers
Cablevision Systems	324973	Telecommunications
Owens Corning	324833	Not Classified
Bsoton Scientific	324597	Medical Products & Equipment
Alcoa	323207	Metals
Halliburton	320684	Oil & Gas Equipment Svcs
3M	319122	Not Classified
General Dynamics	317465	Aerospace & Defense
Southwest Airlines	310516	Airlines

Waste Management	291678	Not Classified
Rite Aid	281132	Food & Drug Stores
Avis Budget Group	278326	Auto Retailing
Black & Decker	275385	Home Equipment & Furnishings
Delta Airlines	269222	Airlines
NCR	268719	Computers & Office Equip
Home Depot	268353	Specialty Retailers
Tyson Foods	262897	Food Production
Sherwin-Williams	260130	Chemicals
IBM	260080	IT Services
Walt Disney	252287	Entertainment
Fiserv	243650	Financial Data Services
Kroger	233129	Food & Drug Stores
TRW Automotive	229985	Motor Vehicles & Parts
Mattel	204069	Not Classified
Family Dollar Stores	202435	General Merchandisers
Parker Hannifin	196786	Industrial Machinery
Walmart	193146	General Merchandisers
Gannett	163084	Publishing, Printing
Tenet Healthcare	157454	Healthcare Med Facilities
FedEx	149338	Mail, Package & Freight
Macy's	149054	General Merchandisers
Petsmart	148971	Specialty Retailers
Harrar's Entertainment	126588	Hotels, Casinos, Resorts
UPS	120859	Mail, Package & Freight
GAP	108403	Specialty Retailers
Affiliated Computer Svcs	94785	IT Services
Marriott Intl	88219	Hotels, Casinos, Resorts
Starbucks	58994	Food Services
McDonalds	58805	Food Services

Sources:

1. *Directory of Top Computer Executives* database, Applied Computer Research, Inc., 2010. Information available at www.itmarketintelligence.com. Ratio data is calculated with 10% of outliers eliminated.
2. *Inside IT Departments: Comparing Organization Size to IT Usage and Infrastructure Traits*, Applied Computer Research, Inc., 2008. Available at www.itmarketintelligence.com/mo-reports.htm.
3. *InformationWeek 500*, September, 2008. www.informationweek.com.
4. *Fortune Magazine*, April 18, 2005, and *Fortune Magazine*, May 4, 2009. www.fortune.com.

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Applied Computer Research, Inc. publishes the *Directory of Top Computer Executives*, a database of the mid size and large IT user organizations in the U.S. and Canada. Over 34,000 organizations and 63,000 IT executives are included. ACR uses the techniques discussed in this document to develop sales support and marketing campaign lists for telemarketing, direct mail, email marketing campaigns and field sales support. Visit www.itmarketintelligence.com, or call 800-234-2227 for more details. Contact Alan Howard at 800-234-2227 or alan@topitexecs.com if you have additional questions about this document or its content.



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