North American Survey of Laboratory Purchasing Trends

Laboratory Products Association
Society for Laboratory Automation and Screening

January 2014

K.C. Associates

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Situation Analysis

The Laboratory Products Association (LPA) represents manufacturers and distributors of laboratory equipment and supplies. The LPA provides economic and market information to its members. The Society for Laboratory Automation and Screening (SLAS) has participated in this project since 2009. This study collects data and customer input to give their view of what is happening in the laboratory market.

Methodology

K.C. Associates conducted a Baseline Study of Purchasing Trends in 2002, 2003 and 2004 and again in 2007 through 2014. The products included in this study, as defined by LPA members, were listed in nine categories:

- Chemicals, reagents, solvents
- Glassware, plasticware
- Consumables excluding chemicals
- Laboratory equipment <$2,500
- Laboratory equipment >$2,500
- Laboratory instruments <$5,000
- Laboratory instruments >$5,000
- Laboratory furniture
- Laboratory automation

Specific segments of the market have been identified. Information for each of these segments is included in the spreadsheets. These segments include the types of organizations:

- Industry
- Hospital
- Government
- College/University
- Independent/Contract Lab

Also included are specific product/service areas:

- Basic Research
- Biotechnology
- Chemicals
- Clinical
- Environmental
- Pharmaceutical

Findings

There were 811 responses for the US and Canada in the Baseline Trending Study for 2014 giving a Confidence Level of 95% $\pm$3. The summary information is for the overall responses. The comparisons presented on the following pages represent the responses to the SAME questions from each of the surveys (2002, 2003, 2004, 2007, 2008, 2009, 2010, 2011, 2012, 2013 and 2014).

Because of the economic conditions starting at the end of 2008 and up through 2014, additional analyses and graphical presentations have been added to this summary.

If there was one phrase to characterize the respondents' view of 2014 it would be "a slight pull back" coming off two years of "steady as you go". Respondents are looking for a slightly smaller workforce but with increased workload. For their purchases, there is continued growth in consumables such as chemicals, kits and solvents. There is a more restrained purchase activity for non-capital items. The expensive instruments show some increases after being held back for several years.

Note: The percentages listed in the charts are the **PERCENT OF RESPONDENTS** not the percent of increase or decrease. Information about the percent change is listed in the full graphical report and the spreadsheets.

Personnel Changes (Question 1)
In 2009, more respondents indicated a decrease in laboratory personnel than in previous years. Thirty percent of the respondents said there was a decrease in personnel. This is the largest percent for decrease since the survey was started.

In 2010, the percent of respondents indicating a decrease in personnel returned to the 2008 amount, 23%. In 2011, only 13% indicated a decrease in personnel, while in 2012 and 2013 15% stated there was a decrease. In 2014, 23% indicated a decrease in personnel.

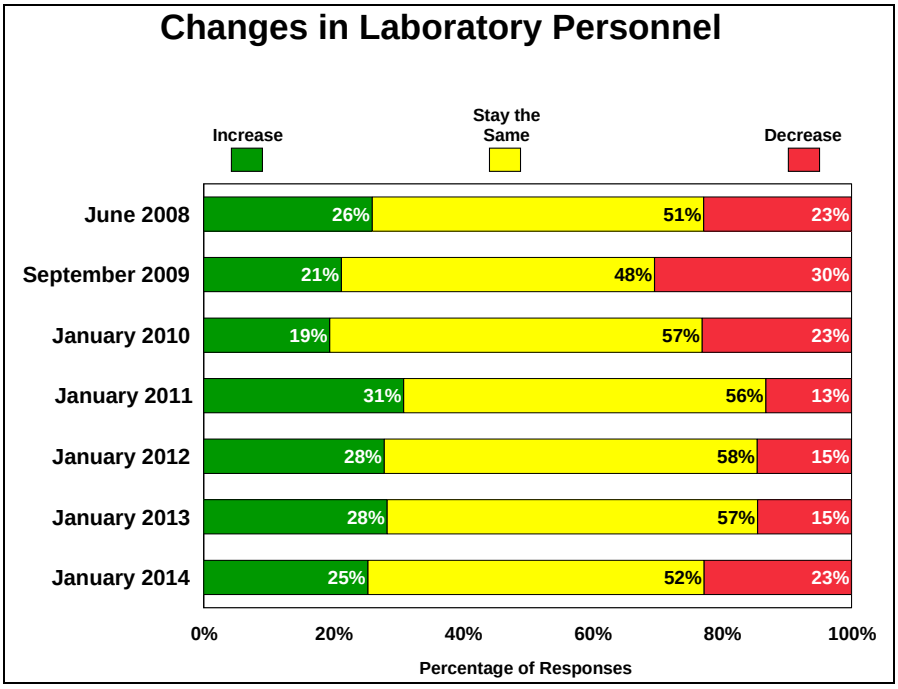
The number of those stating there would be an increase dropped from 31% in 2011 to only 28% in 2012 and 2013. For 2014, this has dropped again to 25%.

The percent of respondents indicating that the number of laboratory personnel would "Stay the same" has stayed nearly flat from 2010 through 2013 but dropped to 52% projected for 2014.

For 2014, the percent of respondents indicating there was an increase in hiring fell by 3%. The number of respondents saying the staff would remain the same fell by 5% and those saying there would be a decrease in staff increased by 8%.

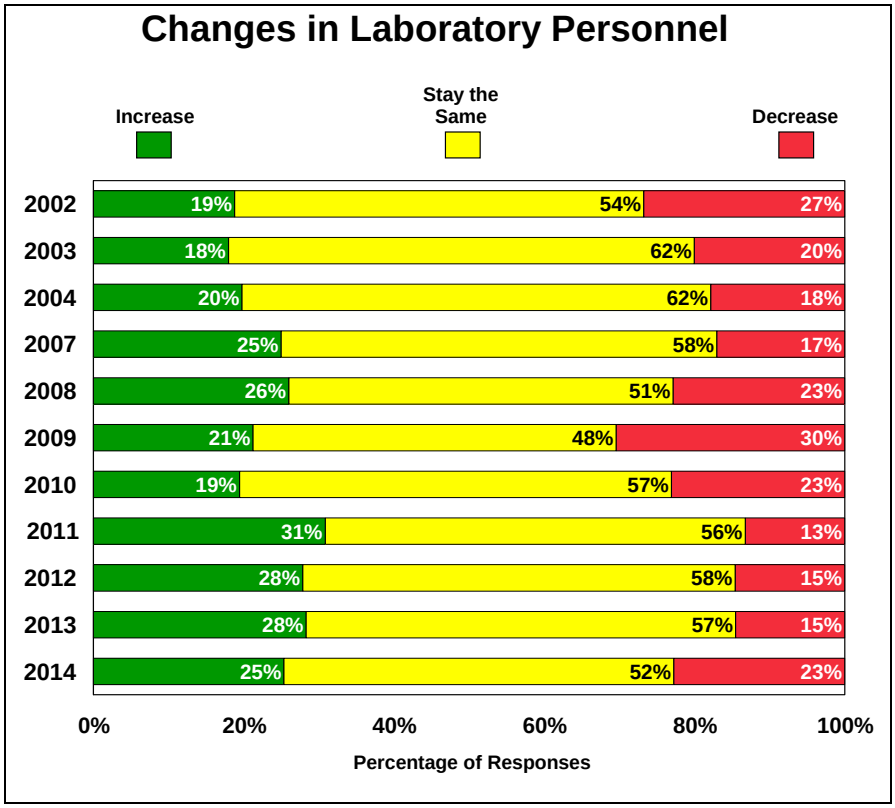
Percentage of Change in Laboratory Personnel

Year	Increase	"Stay the Same"	Decrease
2008	26%	51%	23%
2009	21%	48%	30%
2010	19%	57%	23%
2011	31%	56%	13%
2012	28%	58%	15%
2013	28%	57%	15%
2014	25%	52%	23%



Types of Organizations: The changes in personnel differ by the type of organization being represented. Overall, industry numbers increased while hospital, government and independent/contract labs declined slightly. College/University was nearly flat.

Market Segments: The Basic Research and Clinical segments show more decreases than increases. Chemicals show the greatest increase with 26% of the respondents indicating an increase and 17% indicating a decrease.



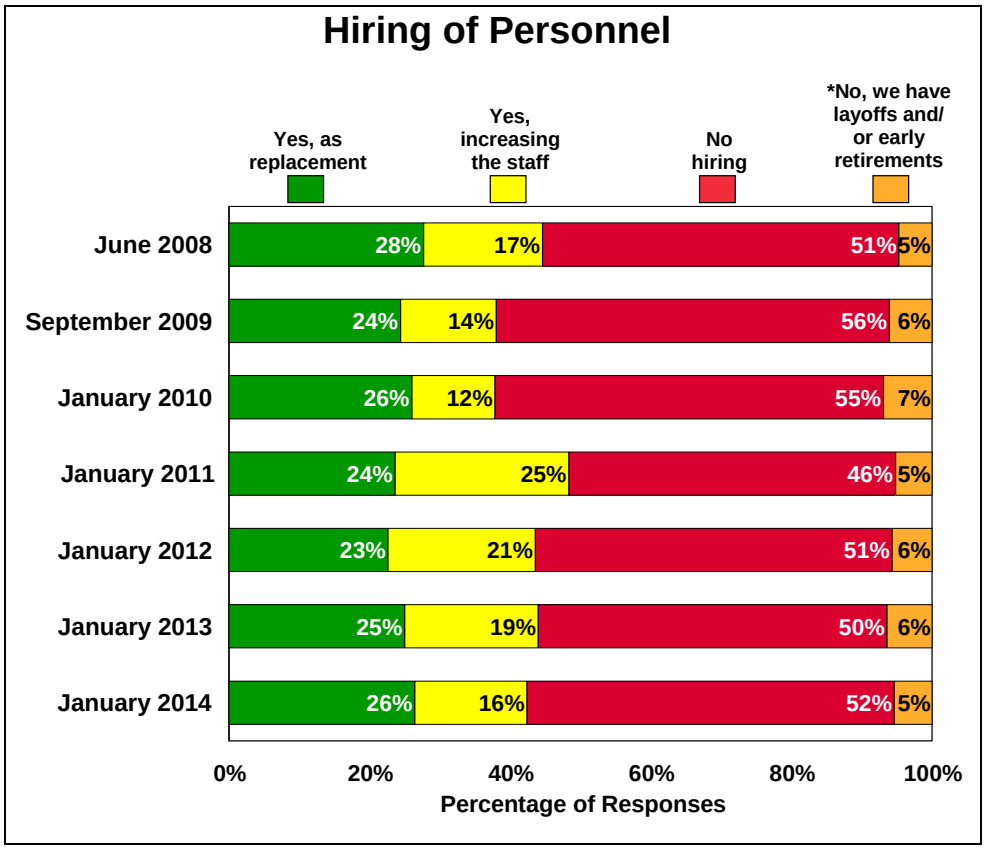
Hiring of Personnel (Question 2)

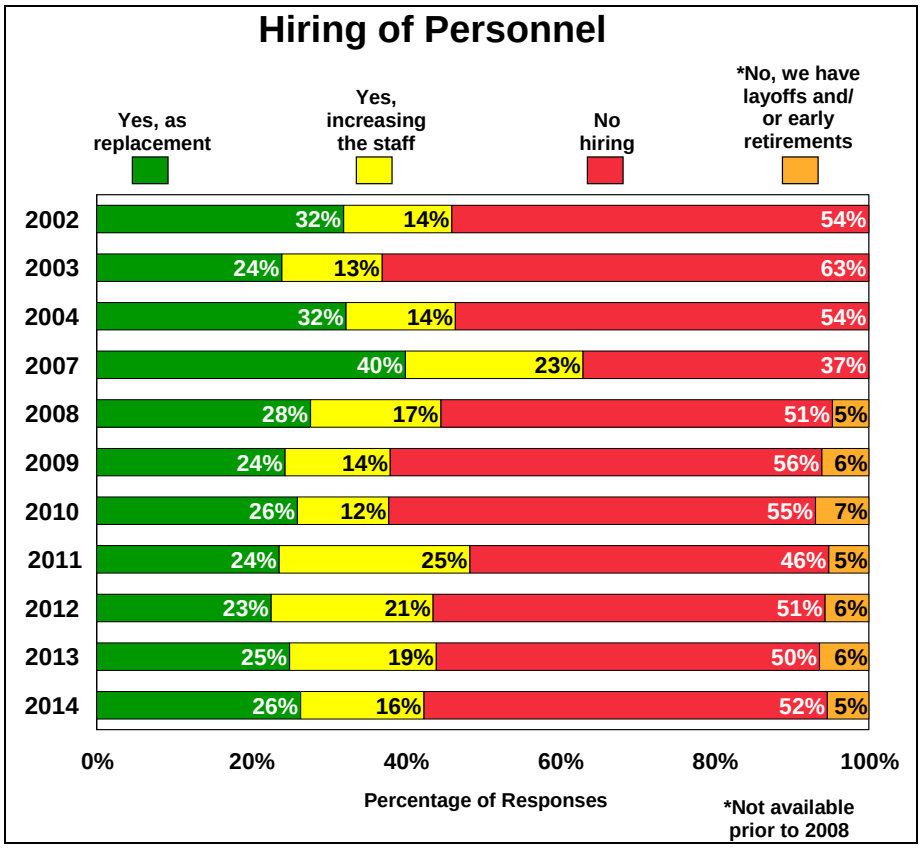
Increasing Staff: There were significant differences in the hiring of personnel from the earlier Baseline Studies. In 2007, 63% of the respondents said there is hiring for replacements or to increase the staff. In 2008, that dropped to 45%. In 2009, hiring dropped to 38%. This remained the same for 2010. "Hiring for replacements or to increase the staff" for 2011 increased to 49% but fell back to 44% for 2012 and 2013. For 2014, this fell back again to 42%.

Layoffs and Early Retirements: In 2008, a new category was added – "No, we have had layoffs and/or early retirements". In 2008, 5% of the respondents indicated they did have layoffs or early retirements. That increased to 6% in 2009 and then 7% in 2010. In 2011, it has dropped back to 5% and increased to 6% in 2012 and 2013 and dropped back at 5% for 2014.

Hiring Laboratory Personnel

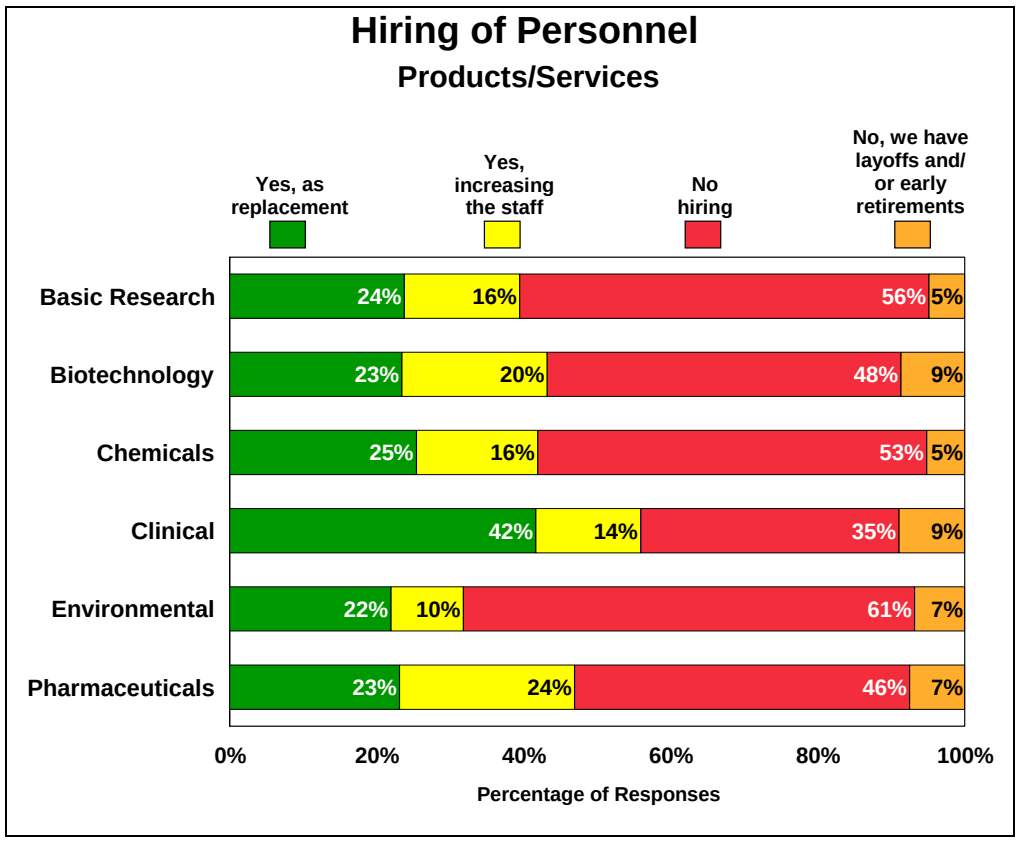
Year	Yes, hiring replacements	Yes, staff increase	No hiring	No, hiring, layoff/ early retirement
2008	28%	17%	51%	5%
2009	24%	14%	56%	6%
2010	26%	12%	55%	7%
2011	24%	25%	46%	5%
2012	23%	21%	51%	6%
2013	25%	19%	50%	6%
2014	26%	16%	52%	5%





Types of Organizations: Approximately 16% of the respondents indicated that their organizations were increasing staff in 2014 down from 19% of respondents in 2013. Four to ten percent (4% - 10%) of the respondents indicated they are having layoffs and early retirements. In the types of organizations, 27% to 62% said there was no hiring. Hospitals were the lowest at 27%. Industry, government and independent laboratory respondents indicated that 51% to 58% had no hiring.

Market Segments: The Basic Research and Clinical segments show more decreases In 2014 for the product/market segments, the respondents from the "Clinical" segment said they were hiring replacements or increasing staff more frequently than the other segments, 50% of respondents compared with 54% in 2013. The other segments ranged from 22% to 25% as compared to 40% to 47% in 2013.



Workload Changes (Question 3)

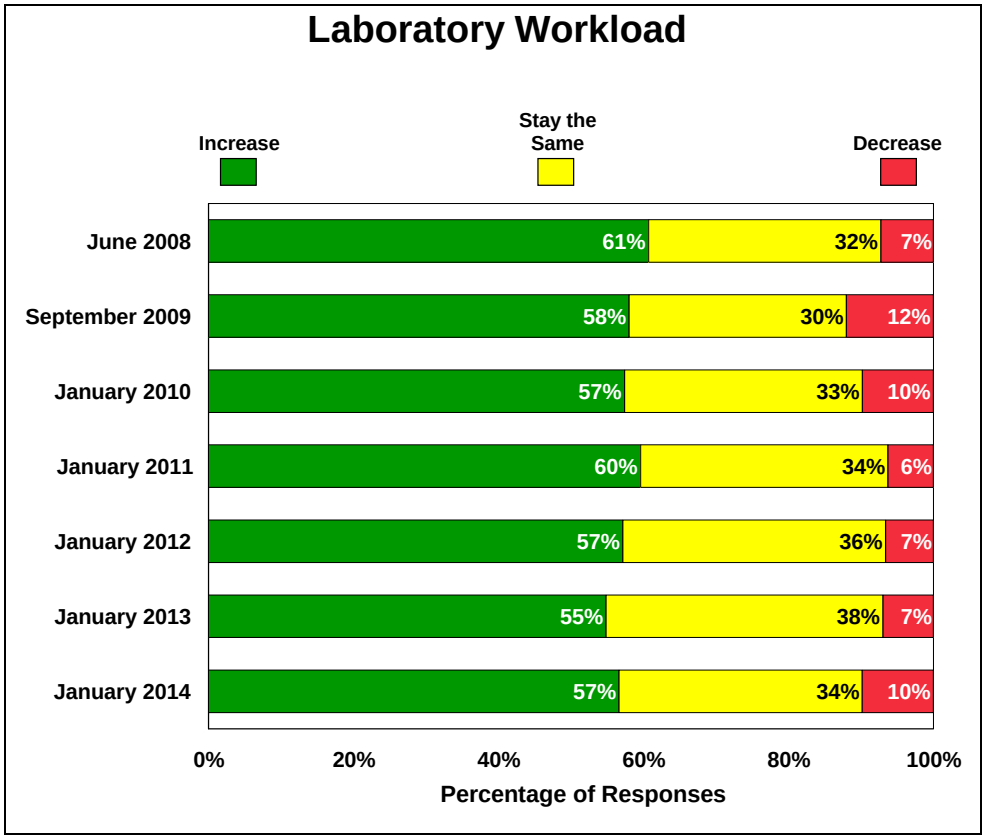
In 2014, 57% of the respondents indicated that the workload will increase. This compares to 55% of the respondents said the workload had increased for 2013 as compared to 57% in 2012, 60% in 2011 and 57% in 2010.

Ten percent (10%) said their workload will decreased in 2014. For 2013, only 7% indicated there was a decrease in the workload – exactly the same as 2012.

For 2014, 34% of the participants stated that the workload would remain the same as 2013. This differs from 38% in 2013 and 36% in 2012.

In 2008, 61% of the participants said the laboratory workload had increased. That had steadily fallen to 57% in 2010 with a slight rebound in 2011 to 60%. This slipped back to the 57% range in 2012 and a little more in 2013 to 55%. There was a slight move forward for 2014 to 57%.

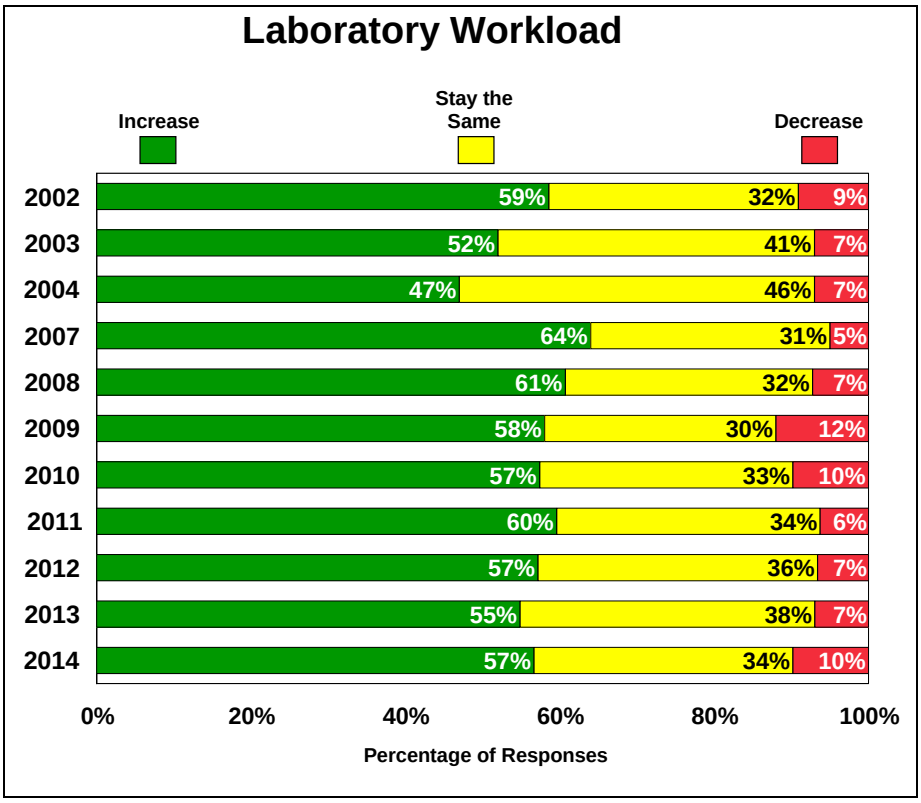
Only 7% identified a decrease in the workload in 2012 and 2013. This has jumped to 10% in 2014. Those respondents saying their workload would remain the same were 36% and 38% (2012 and 2013, respectively) falling 4% to 34% in 2014.



	Change in Workload		
Year	**Increase**	**"Stay the Same"**	**Decrease**
2008	61%	32%	7%
2009	58%	30%	12%
2010	57%	33%	10%
2011	60%	34%	6%
2012	57%	36%	7%
2013	55%	38%	7%
2014	57%	34%	10%

Types of Organizations: According to the respondents, more than half of the respondents said the workload will increase (49% - 63%). Industry was the highest with 63%. As for a decrease in workload, between 5% and 23% indicated their workload had decreased.

Market Segments: According to the respondents, more than half of the respondents said the workload will increase (50% - 70%). Biotechnology was the highest with 70%. Pharmaceuticals was 61% and Chemicals and Environmental were both 60%. Basic Research was the lowest with 50%. As for a decrease in workload, between 8% and 14% indicated their workload will decrease.



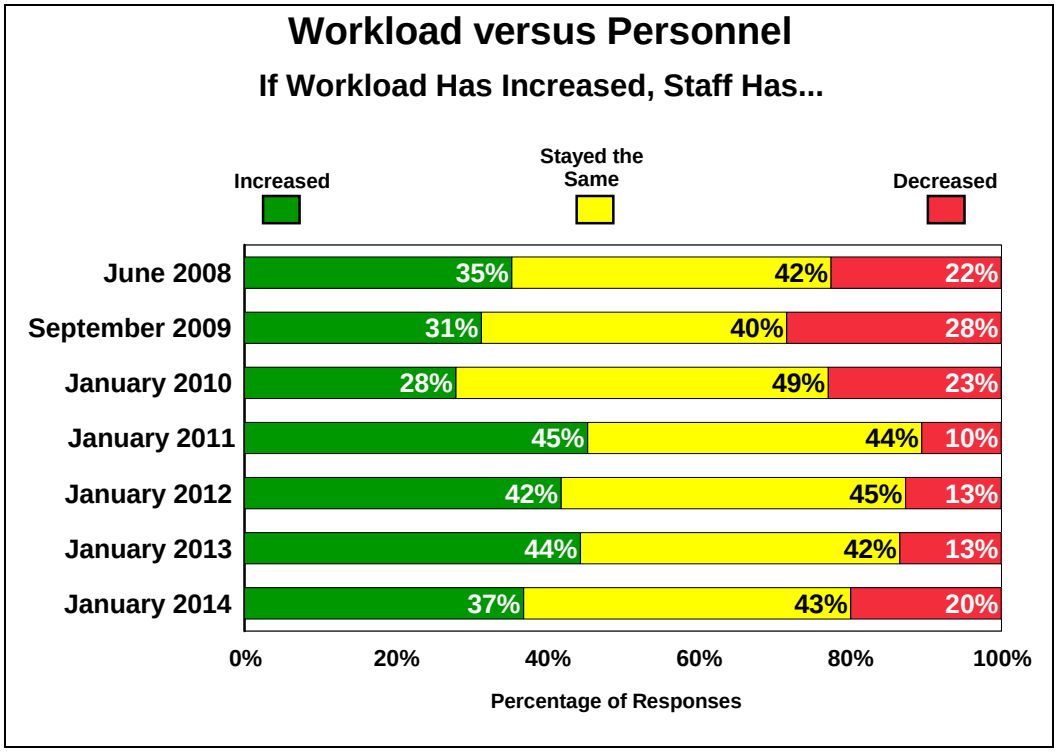
Note: In the Appendix, with spreadsheets, there is a comparison of the workload and staff by Organization and Products/Services providing very interesting information for each segment.

Increasing Workload

It is of interest to analyze what happens to the number of laboratory personnel versus the change in workload.

In 2013, if the workload was increasing, 44% of the laboratories increased their staff with another 42% keeping their staff the same and 13% decreased their staff with an increased workload.

In 2014, if the workload will increase, 37% of the laboratories increased their staff with another 43% keeping their staff the same and 20% decreasing their staff with an increased workload.



Change in Personnel with Increase in Workload

Year	Increase	"Stay the Same"	Decrease
2008	35%	42%	22%
2009	31%	40%	28%
2010	28%	49%	23%
2011	45%	44%	10%
2012	42%	45%	13%
2013	44%	42%	13%
2014	37%	43%	20%

Types of Organizations: Considering the type of organization, in general, if the workload will increase so will the staff. The Independent/Contract lab was the only difference. When the workload increases, 37% said the respondents indicated an increase in personnel. However, in this same group 40% said they lost staff even when the workload goes up.

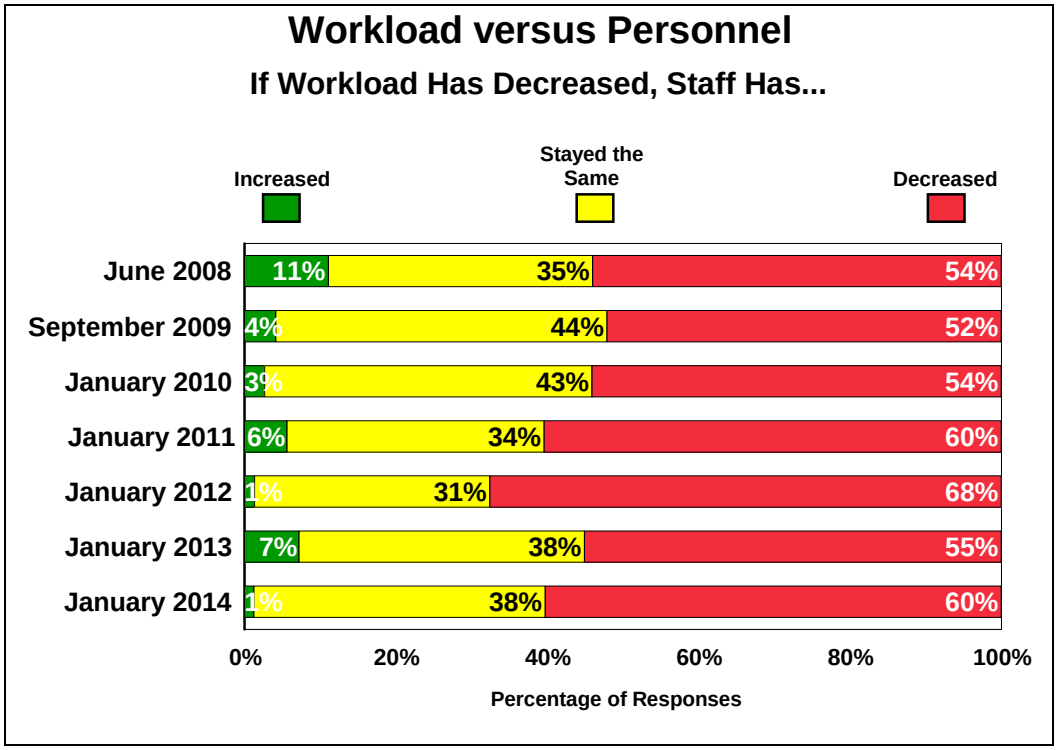
Market Segments: For the market segments, 33% - 44% stated that if the workload increases so did the staff.

Workload Decreasing

If the workload decreased in 2010, 54% of the respondents said the number of laboratory personnel also decreased. This jumped to 60% of the respondents indicating in 2011 that the laboratory personnel decreased with a decrease in workload. This was up to 68% for 2012. This situation fell slightly in 2013 to 55%, but rose again to 60% for the prediction for 2014 which is the same as in 2011.

There is some hesitation about reducing the number of people if the workload is reduced. While this is a small number of laboratories, the respondents stated there could be cuts with reduced work.

In 2008, 11% of the companies continued to hire even if the workload decreased. In 2012, only 1% of the respondents said there would be hiring of personnel with a decrease in workload. However, in 2013, 7% increased their staff. This has fallen back to 1% for 2014.



Change in Personnel with Decrease in Workload

Year	Increase	"Stay the Same"	Decrease
2008	11%	35%	54%
2009	4%	44%	52%
2010	3%	43%	54%
2011	6%	34%	60%
2012	1%	31%	68%
2013	7%	38%	55%
2014	1%	38%	60%

Types of Organizations: If the workload decreased only the College/University sub-set indicated the staff would go up, but this was only 5% of the group.

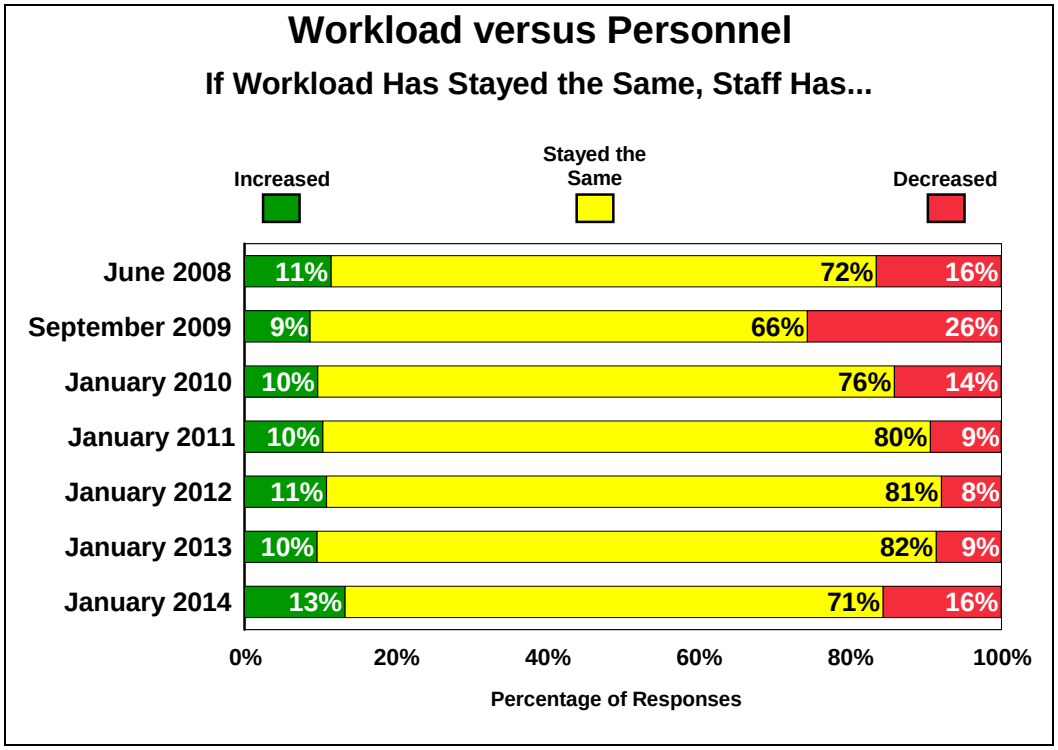
Market Segments: For the market segments, if the workload decreased all the respondents in all segments, except Environmental, said there was no increase in staff. For Environmental, nine percent (9%) said the staff increased even if the workload decreased. If the workload decreased 71% - 80% of the respondents in Basic Research, Biotechnology, Clinical and Pharmaceuticals said the staff was decreased.

Workload Staying the Same

In 2009, there was a dramatic reduction in staff if the workload was decreased. Even if the workload stayed the same 26% of the respondents said the staff was cut and only 66% said the staff stayed the same. If the workload stayed the same in 2010, 76% of the respondents indicated that the number of laboratory personnel also remained the same, and 14% said there was a decrease in staff.

In 2011, 80% said the staff would remain the same if the workload was the same. Only 9% said there would be a reduction in staff. In 2012, this is very similar with 81% of the staff being the same if the workload was the same and 8% showing reductions and 11% indicating an increase in staff.

In 2013, if the workload stayed the same, 82% of the respondents said the number of employees would remain the same. Also, 10% said there would be an increase and another 9% said there would be a decrease. For 2014, only 71% of the respondents indicated that the workforce would remain the same if the workload remained the same. That is a drop of 11% of respondents in one year. Also in 2014, if the workload remained the same, 13% said the staff would increase while 16% said it would decrease – a net loss of 3%.



Change in Personnel with Workload Staying the Same

Year	Increase	"Stay the Same"	Decrease
2008	11%	72%	16%
2009	9%	66%	26%
2010	10%	76%	14%
2011	10%	80%	9%
2012	11%	81%	8%
2013	10%	82%	9%
2014	13%	71%	16%

Types of Organizations: If the workload stays the same 5% to 18% of the organizations, with the exception of the Independent/Contract Laboratories, actually will be increasing their staff. The exception was the Independent/Contract Lab which increased the most according to 24% of the respondents.

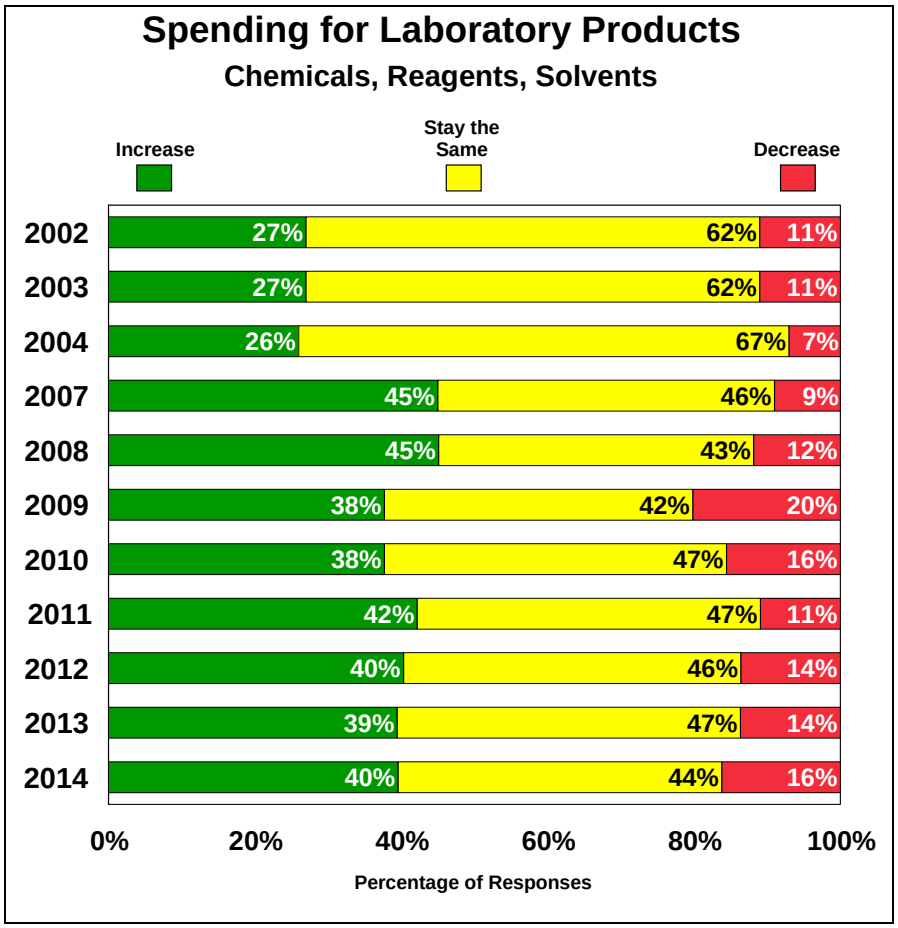
Market Segments: For all of the segments, except Biotechnology, if the workload stays the same, the staff will increase for 7% to 20% of the respondents. If it stays the same, 7% to 36% of the respondents indicate there will be a decrease in personnel.

Spending for Laboratory Products 2014 versus 2013 (Question 4)
Respondents were asked to indicate whether their spending in the laboratory would increase, decrease or stay the same for the nine product categories listed previously.

Chemicals, Reagents, Solvents
The spending for 2007 and 2008, as indicated by the respondents, shows sizeable increases for "Chemicals, Reagents, and Solvents" when compared to earlier years. In 2009, there was a marked increase in the percent of respondents who said they would be decreasing their purchases of chemicals, reagents and solvents. In 2010, this stabilized.

In 2011, nearly half of the respondents indicated their spending on these products would "stay the same" with 42% indicating an increase. Only 11% said there would be a decrease. The spending in 2012 was anticipated to be slightly down with 40% showing an increase, 46% staying the same and 14% having a decrease in spending.

For 2013, there is little change with 39% showing an increase, 47% staying the same and 14% having a decrease in spending. Participants see a little change in 2014 with 40% increasing their spending on Chemicals, Reagents and Solvents, 44% staying the same and 16% decreasing their spending on Chemicals, Reagents and Solvents.

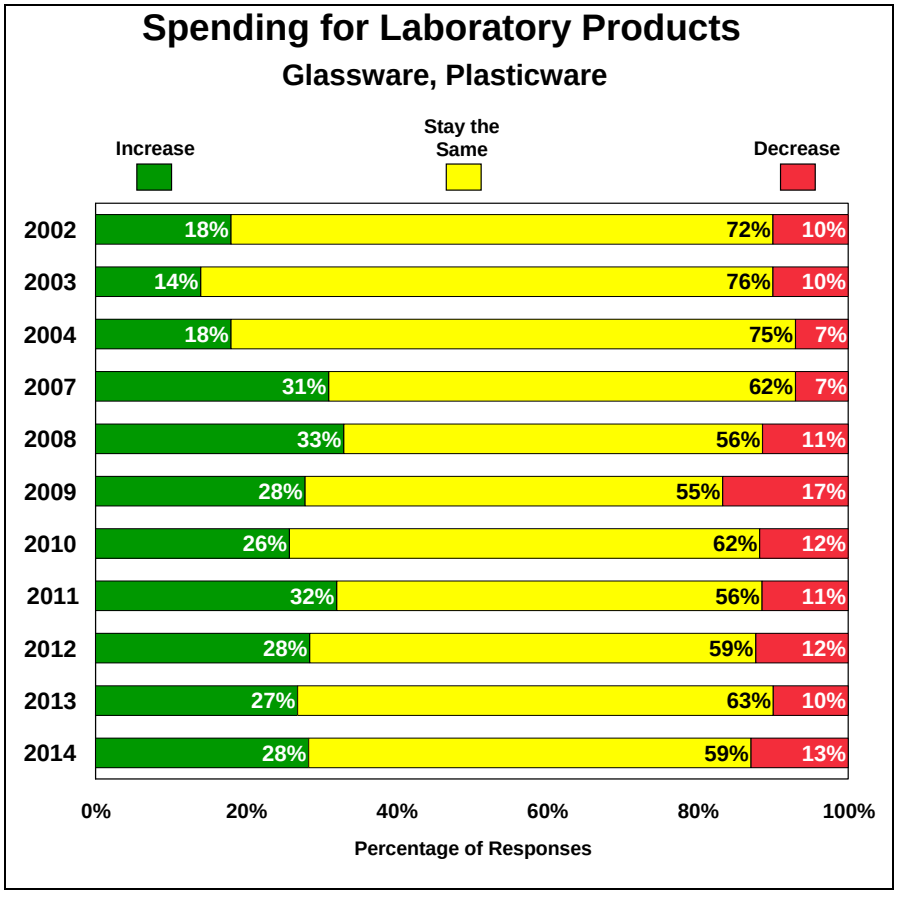


For the segments, “Independent/Contract Labs” and “Industry” are the highest with 43% and 42% of the respondents (respectively) indicating an increase. “College/University” is the lowest with 33% of the respondents showing an increase.

Glassware, Plasticware

In 2010 and 2011, 88% of the participants indicated their purchases would “increase or stay the same” for their purchases for "Glassware, Plasticware" (2012 28% increase and 59% the same) (2011, 32% increase and 56% the same). The year 2009 was down from 2008 at 89% and 93% in 2007.

For 2012, the spending for these products was similar to 2011 with 87% of the respondents saying spending “will be the same (59%) or increase (28%)” from 2011. For 2013, 90% indicated their spending “will be the same (63%) or increased (27%)” from 2011. For 2014, respondents indicate their spending for Glassware and Plasticware ” will be the same (59%) or increase (28%)” from 2013.



This indication for spending for these products will be higher for the “Industry” and “Independent/Contract Labs” with projections for increases for 29% and 36% of the respondents in each market segment, respectively.

Consumables Excluding Chemicals

The spending for "Consumables Excluding Chemicals" in 2011 rebounded from 2010. In 2008, 89% of the respondents said their spending would increase (39%) or stay the same (50%). This dropped to 84% in 2009 and was up to 88% in 2010 and higher in 2011 at 90%. After falling slightly in 2012 to 88% (36% increase and 52% the same) it seems to rebound in 2013 to 90% (34% increase and 56% the same) with only 10% indicating a decrease. In 2014, 35% anticipate an increase while 53% will stay the same and 12% will decrease

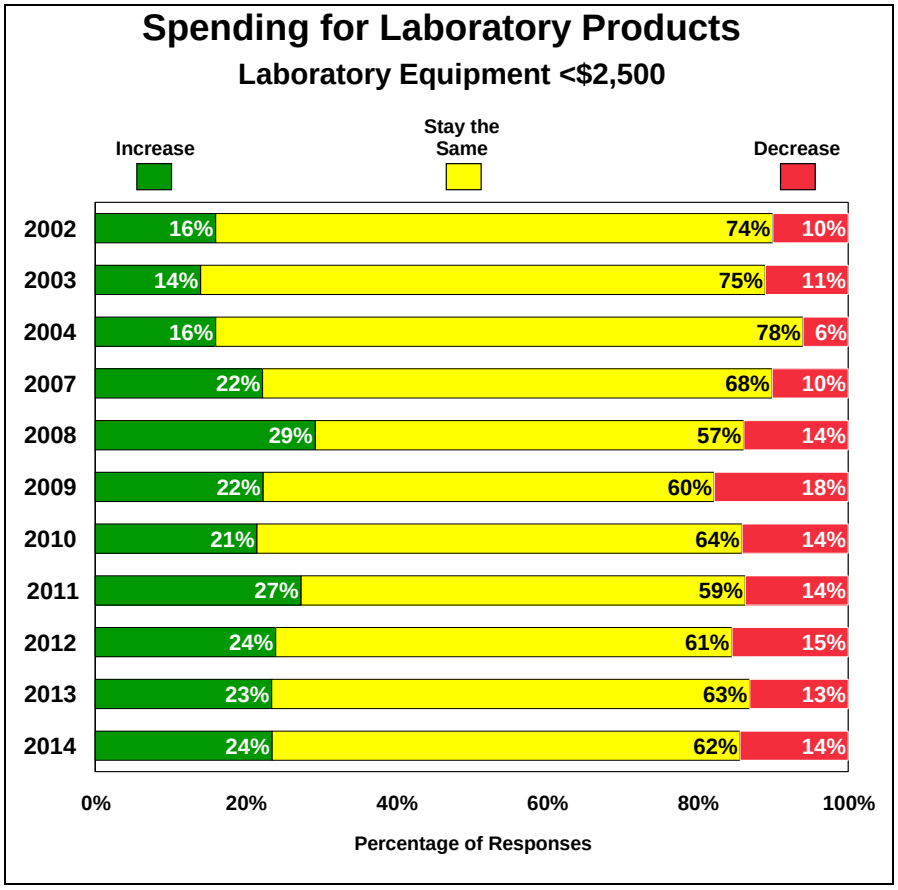
This indication for spending is mixed across all types of organization segments (38% for Government to 42% for Independent/Contract Lab) with Industry at 37%. The spread across the products/services segments was very unclear ranging from 27% to 44%. Biotechnology and Environmental were the highest with 41% and 44%, respectively.

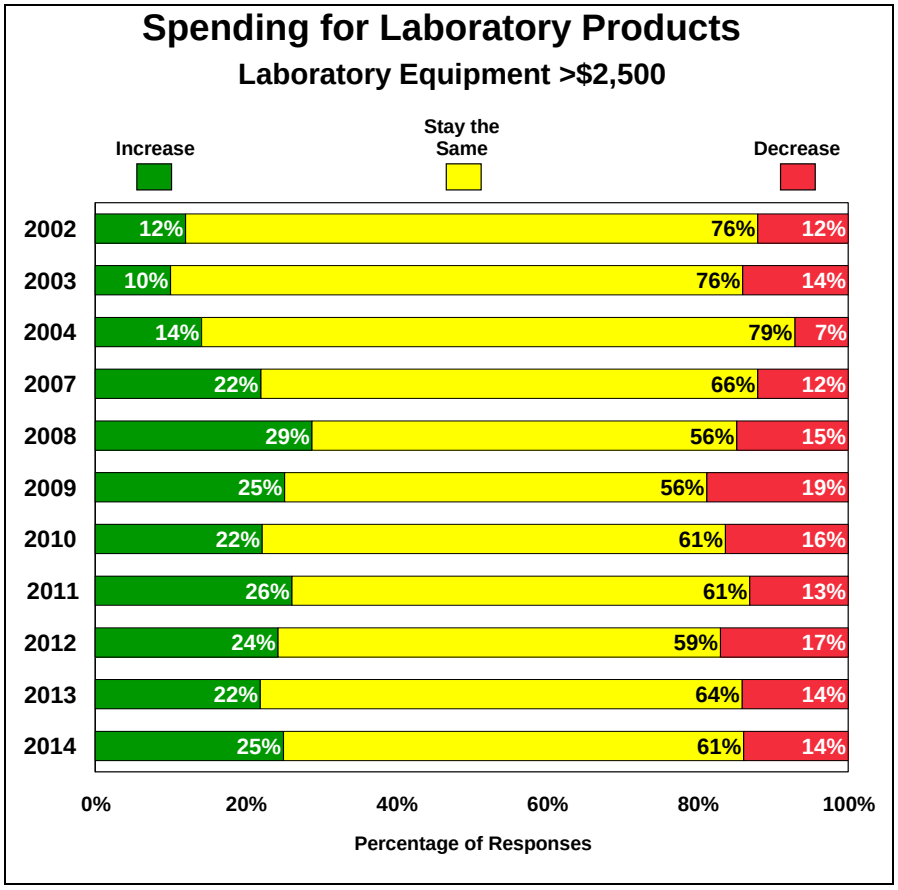
Laboratory Equipment <$2,500 and >$2,500

Laboratory Equipment <$2,500: The number of respondents who said they would increase the spending in 2014 on "Laboratory Equipment <$2,500" is 24%. Another 62% said their spending would remain the same as 2013. However, 14% indicated they would spend less.

In the past, those keeping their spending at the same levels remained the same in 2011 (86%), but slipped back in 2012, then up slightly in 2013 (86% in 2013, 85% in 2012, 86% in 2011; 85% in 2010; 82% in 2009; 86% 2008).

Laboratory Equipment >$2,500: For the equipment of >$2,500, those seeing an increase in spending was up from 22% in 2013 to 25% in 2014. Sixty-one (61%) stated their spending would be the same as 2013. This is down from 64% in 2013. Those indicating a decrease, remain the same in 2013 and 2014 at 14%.





Types of Organizations: The types of organizations are reasonably uniform when considering the purchase of lower cost products for the laboratory. The Independent/Contract Labs were more positive in their predicted spending for products less than or greater than $2,500.

Market Segments: The Biotechnology and Pharmaceutical laboratory representatives were more positive in their predicted spending for these products 41% and 31%, respectively.

Laboratory Instruments <$5,000 and >$5,000

Laboratory Instruments <$5,000: For the more expensive products in the laboratory, the projected purchases in 2014 over 2013 in the <$5,000 category are to increase for 18% of the respondents. Seventy percent (70%) will remain the same and 13% will decrease.

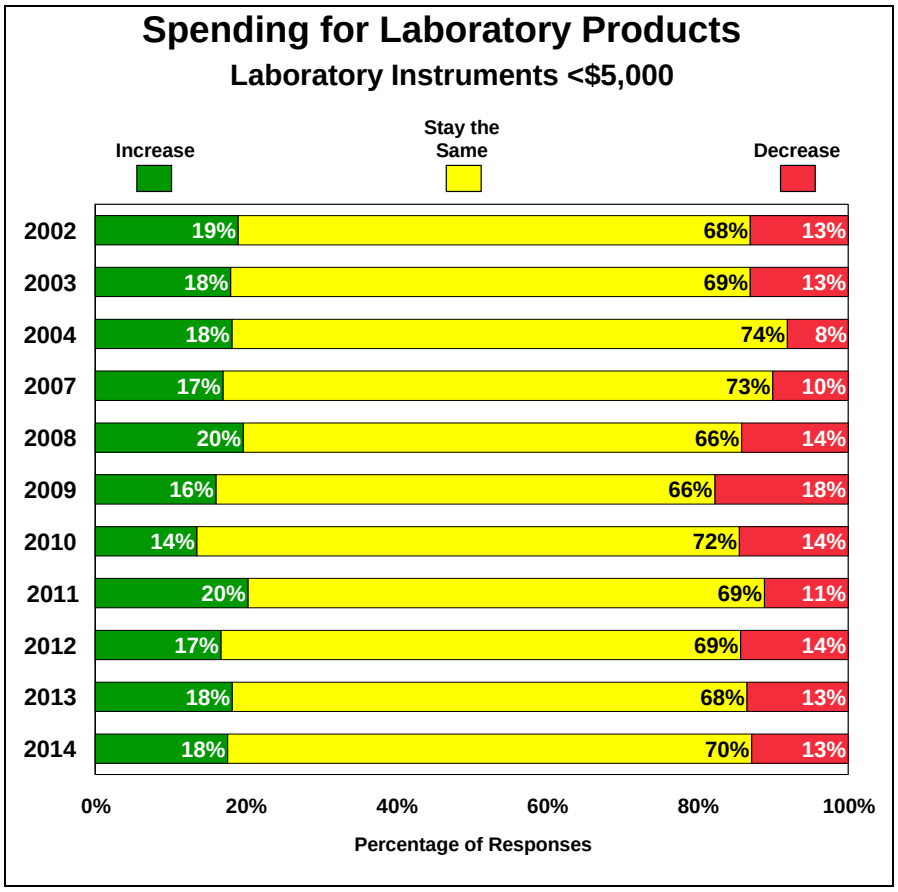
Laboratory Instruments >$5,000: Laboratory Instruments >$5,000 will increase in 2014 for 29% of the respondents. Another 14% for the >$5,000 products will decrease their spending while 57% will stay the same.

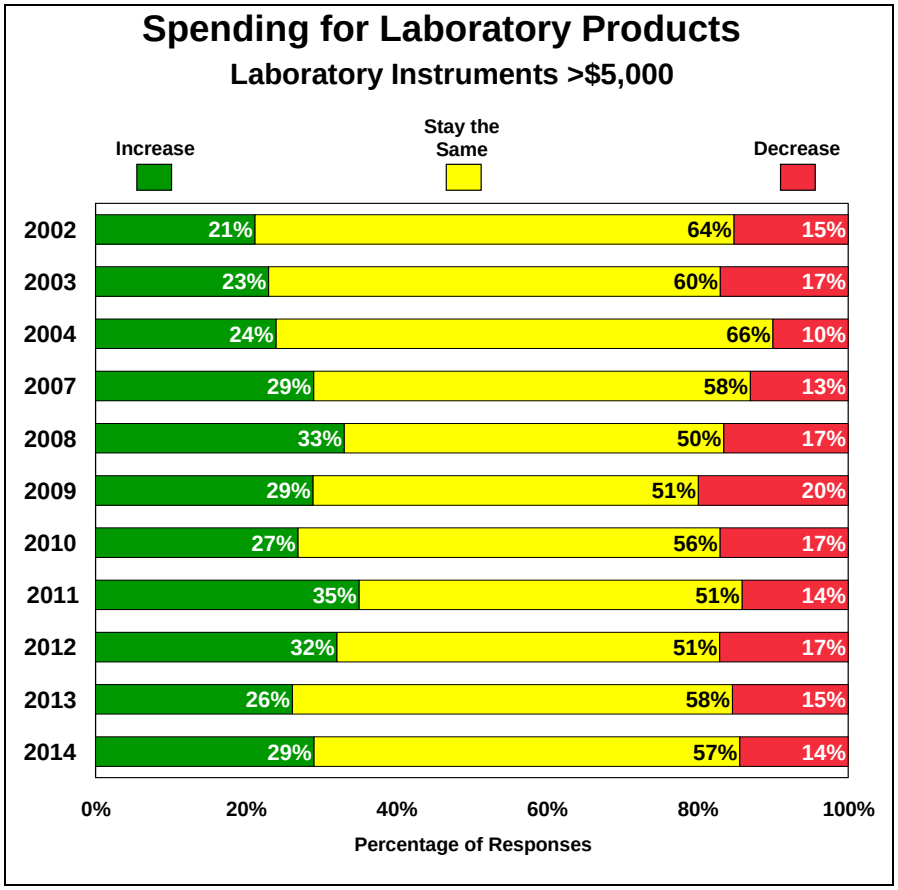
Types of Organizations: The higher priced products and instruments have been more severely affected in the last few years. These respondents, 19% to 37%, indicated more spending on the higher priced products for 2014.

Market Segments:

The respondents from "Independent/Contract Labs" (8% positive gain) and "Industry" (12% positive gain) are the most positive for the <$5,000 products. "Pharmaceuticals" and "Chemicals" indicated they would have the largest increases (6% and 9% respectively) indicating an increase in spending on these products.

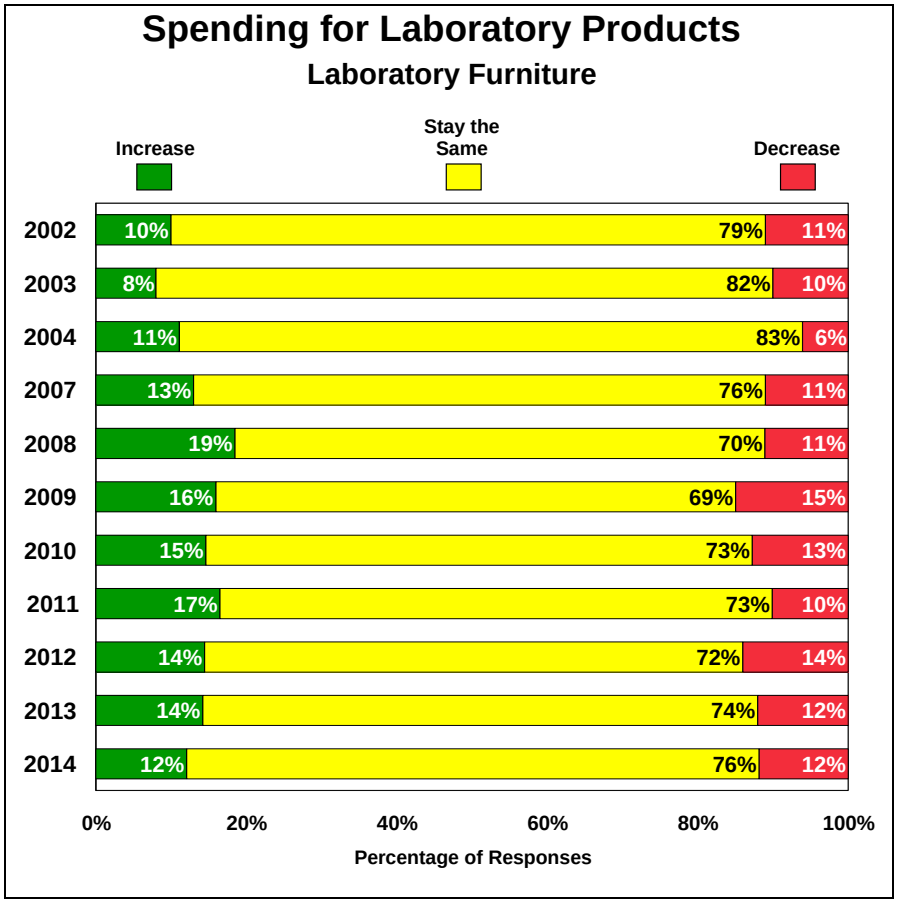
For products >$5,000, "Independent/Contract Labs" had the greatest potential with a positive 28% gain. "Basic Research" has a negative potential with 20% decreasing their purchases and only 19% increasing. Industry, Hospitals and Government all were positive with +16% to +20% increases. College/University respondents see a slight decline.





Laboratory Furniture

In 2013, the purchases of Laboratory Furniture were seen to be increasing by 14% of the respondents and decreasing by 12% with 74% remaining the same. In 2014, the same percentage of respondents (12%) see an increase as see a decrease. Fully, 76% of the respondents indicate their spending will remain the same.



Laboratory Automation

In 2009, a new category for "Laboratory Automation" was added to the list of products. For those purchasing this product area, 72% stated their purchases would be the same in 2010 as they were in 2009. In 2009, 69% said their 2009 purchases would remain the same as in 2008. In 2010, 9% of the respondents said there would be a decrease in expenditures and 19% will increase.

In 2011, only 8% indicated a decrease in spending and 21% said there would be an increase. In 2012, 17% projected an increase in spending which is down from 21% in 2011. For 2013, 17% indicate an increase in spending for these products while 8% said a decrease and 74% will continue with current spending. In 2014 74% of the participants indicated they would have the same spending as in 2013 while another 17% look for an increase in spending on automation.

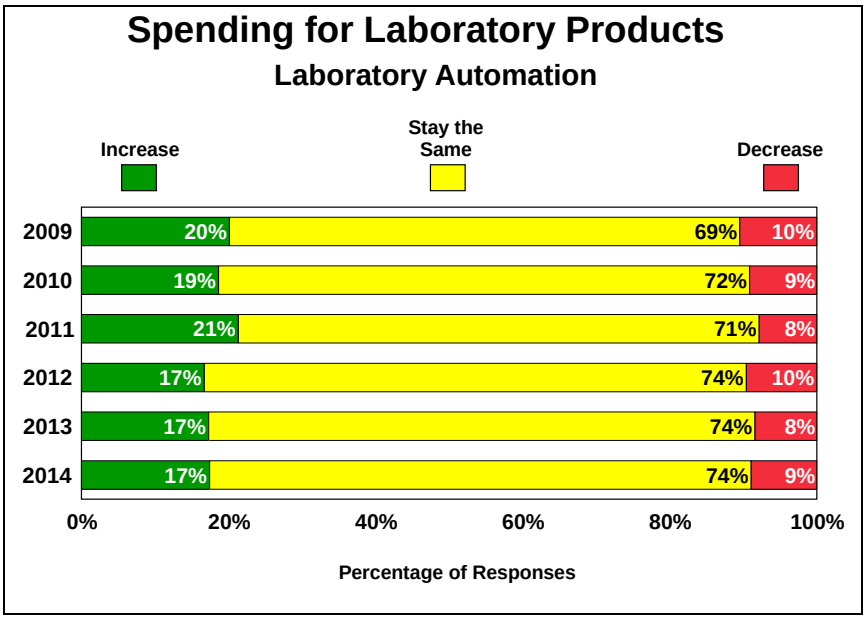
This is a very stable category with little fluctuation.

Change in Personnel with Workload Staying the Same

Year	Increase	"Stay the Same"	Decrease
2009	20%	69%	10%
2010	19%	72%	9%
2011	21%	71%	8%
2012	17%	74%	10%
2013	17%	74%	8%
2014	17%	74%	9%

Types of Organizations: The Independent/Contract Labs (30%) and the Hospitals (27%) are most inclined to increase their spending on laboratory automation.

Market Segments: Clinical segment respondents indicated the highest increase with 26% of the respondents saying there will be an increase.



Purchasing Indicator

A trending study is of vital importance when trying to understand movements of the marketplace. In the previous sections, respondents were asked to indicate whether their purchases for nine specific categories were going to "increase", "decrease" or "stay the same" for 2014 when compared to 2013 purchases.

K.C. Associates developed a Purchasing Indicator using these responses. Since the "stay the same" category can be viewed as neutral/zero growth, the "increase" and "decrease" categories are used to show the delta.

For each of the product categories for 2014, there is a positive difference with the exception of Laboratory Furniture which is 0.

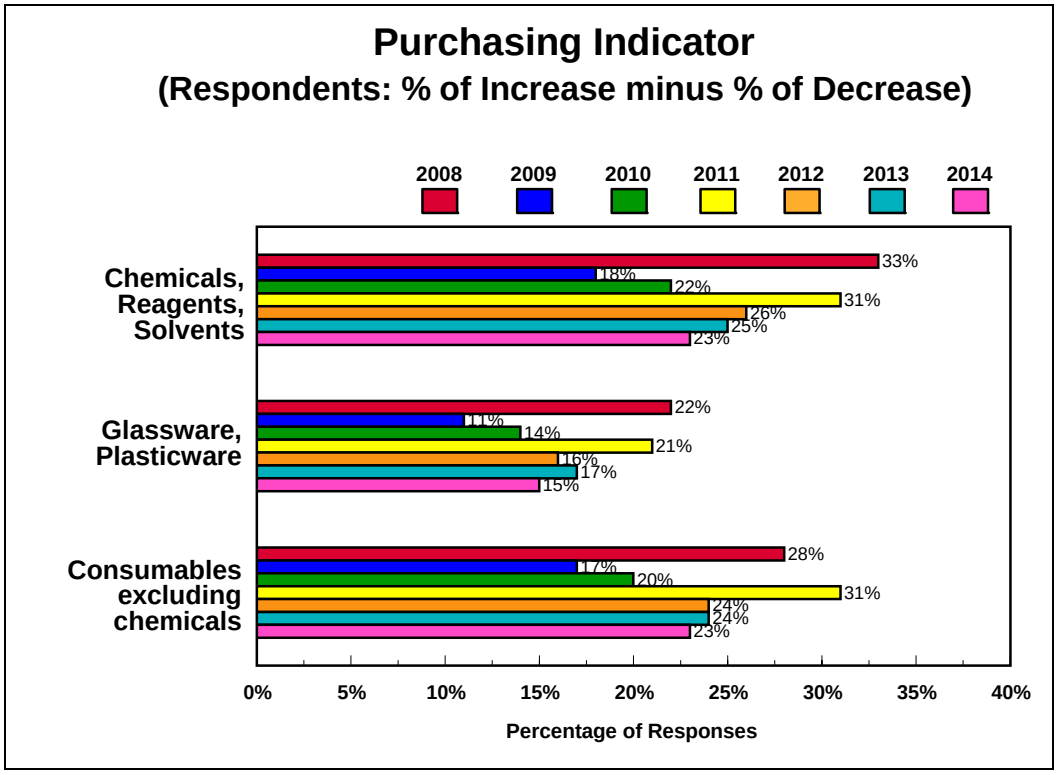
	Projected Changes for 2014			
Product	**Increase**	**Stay the Same**	**Decrease**	**Difference**
Chemicals	40%	44%	16%	24%
Glassware/Plasticware	28%	59%	13%	15%
Consumables	35%	53%	12%	23%
Lab Equipment <$2,500	24%	62%	14%	10%
Lab Equipment >$2,500	25%	61%	14%	11%
Lab Instruments <$5,000	18%	70%	13%	5%
Lab Instruments >$5,000	29%	57%	14%	15%
Furniture	12%	76%	12%	0%
Automation	17%	74%	9%	8%

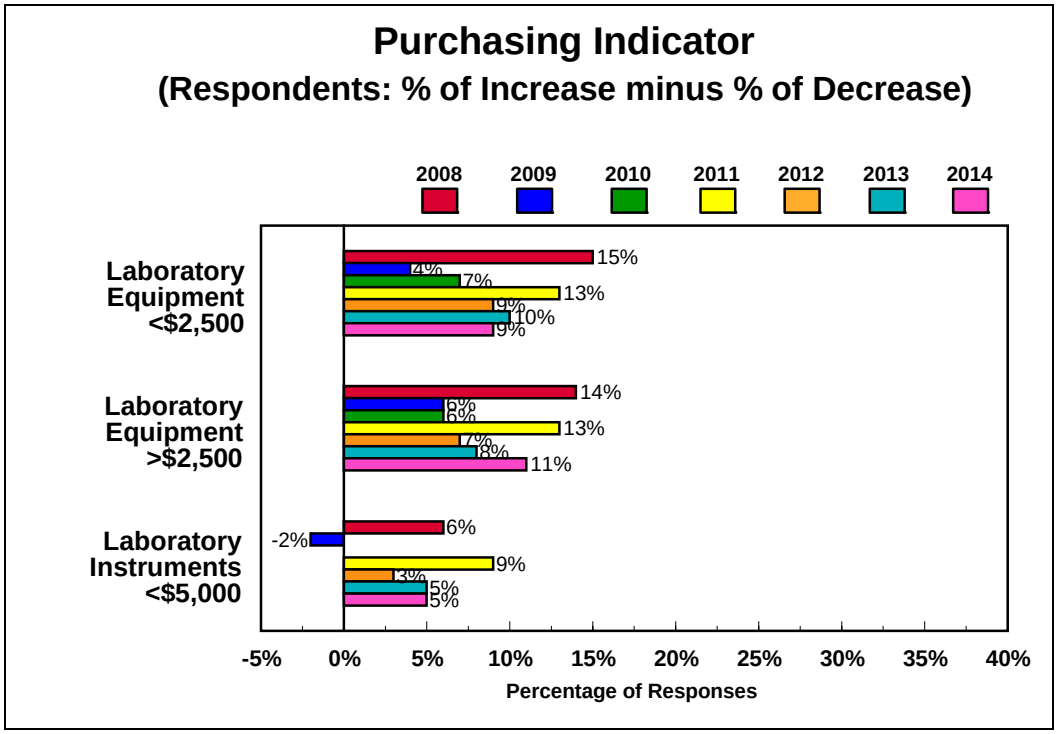
For example, in 2008 45% of the respondents said they would increase their spending for "Chemicals, Reagents, Solvents"; 43% said it would remain the same and 12% said it would decrease. If you eliminate the "stay the same" and look only at the increase and decrease, 33% more respondents indicated they would have increased spending for "chemicals, reagents, solvents" in 2008 versus previous purchases in 2007 (see below). In 2009, this was only 18% rebounding to 22% in 2010.

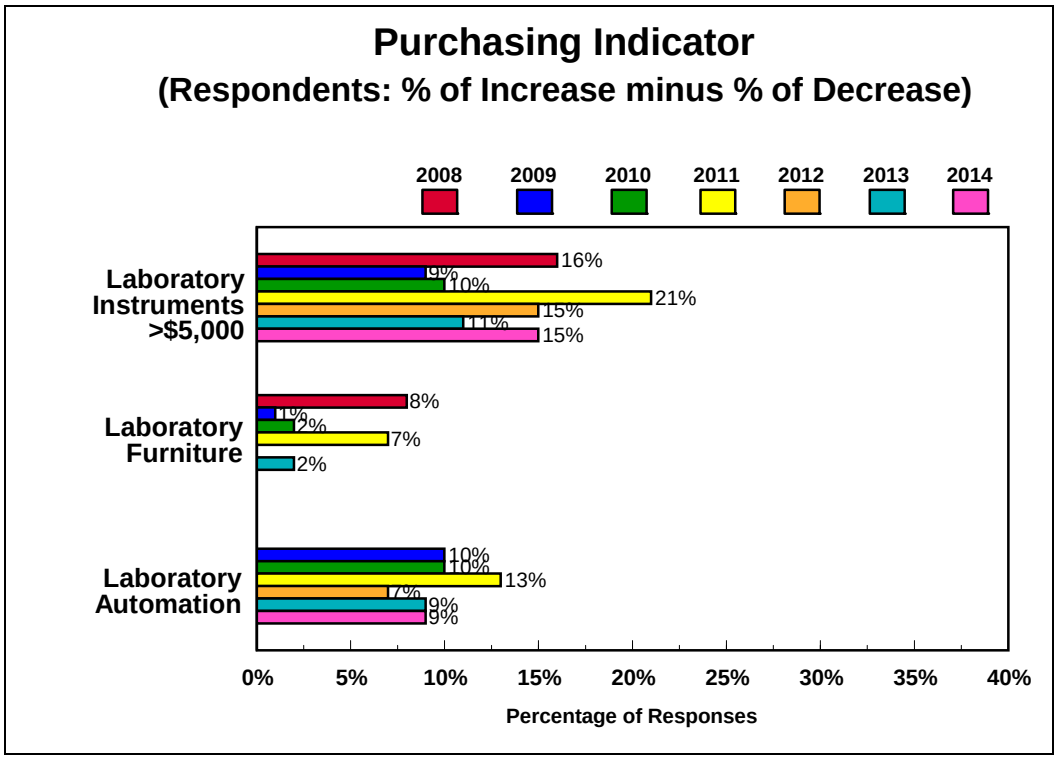
Percent of Respondents for Chemicals, Reagents, Solvents

	% Increase	% Stay the Same	% Decrease	% Difference Increase minus Decrease
2008	45%	43%	12%	33%
2009	38%	42%	20%	18%
2010	38%	47%	16%	22%
2011	42%	47%	11%	31%
2012	40%	46%	14%	26%
2013	39%	47%	14%	25%
2014	40%	44%	16%	24%

The larger the positive difference means that more respondents indicate growth in the market. The markets appear to be rebounding from the difficult times of 2009/2010. However, have slipped off the optimism in 2011 and more in 2012 and 2013 which were nearly identical.

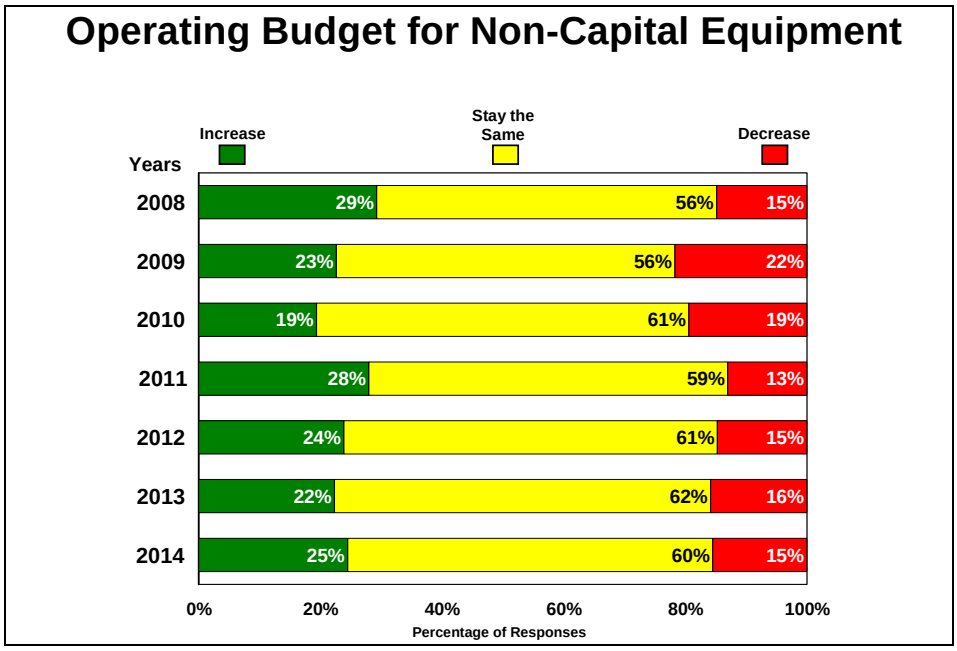



Purchasing Indicator
(Respondents: % of Increase minus % of Decrease)
2008
2009
2010
2011
2012
2013
2014
Laboratory Equipment <$2,500
15%
4%
7%
13%
9%
10%
9%
Laboratory Equipment >$2,500
14%
6%
6%
13%
7%
8%
11%
Laboratory Instruments <$5,000
-2%
6%
9%
3%
5%
5%
-5%
0%
5%
10%
15%
20%
25%
30%
35%
40%
Percentage of Responses

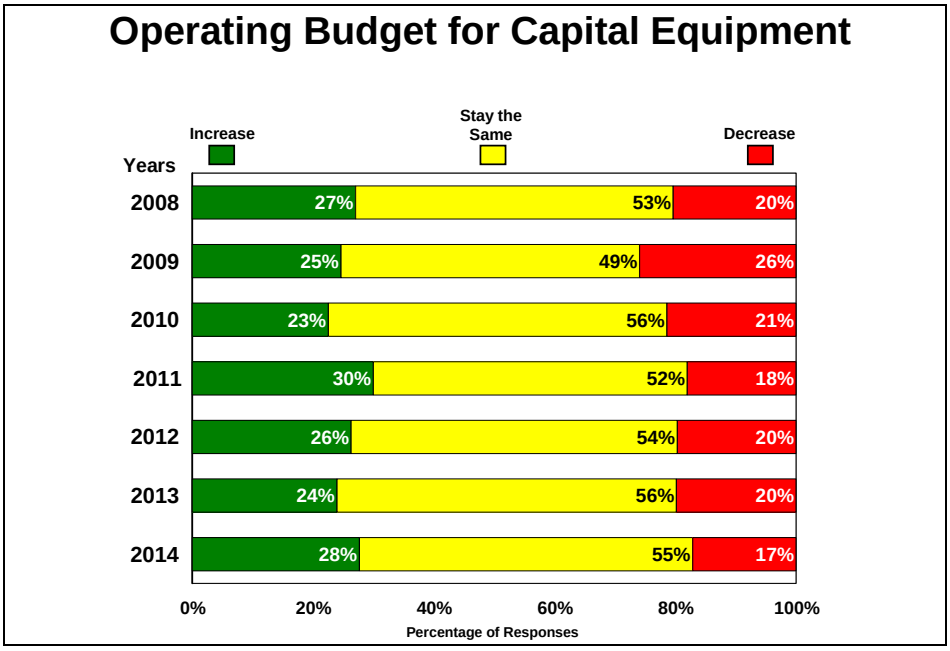

Purchasing Indicator
(Respondents: % of Increase minus % of Decrease)
2008
2009
2010
2011
2012
2013
2014
Laboratory Instruments >$5,000
16%
9%
10%
21%
15%
11%
15%
Laboratory Furniture
8%
1%
2%
7%
2%
Laboratory Automation
10%
10%
13%
7%
9%
9%
0%
5%
10%
15%
20%
25%
30%
35%
40%
Percentage of Responses

Non-Capital Equipment Budgets (Question 5)

The respondents were asked if their Non-Capital Equipment Operating Budgets would be increasing, decreasing or staying the same for fiscal 2014 when compared to 2013. Twenty-five (25%) percent of the respondents indicated an increase in these budgets in 2014, up from 22% in 2013. Additionally, 60% indicated their spending would stay the same and 15% would decrease.



Capital Equipment Budgets (Question 5)
The Capital Equipment Budgets show a large rebound from the 2009 lows. For 2014, more respondents said it would increase (28%) than would decrease (17%) for a 11% positive difference. Fifty-five percent (55%) said they would spend the same amount as in 2013.



Types of Organizations: All of the types of organizations appear more bullish on capital spending with the lowest being the College/University with 21% of the respondents saying there would be an increase in capital spending. The rest of the types of organizations were higher with 28% to 31% seeing more purchasing. The "Industry" and "Government" segments show the most increased spending for "Capital Equipment" (31% of respondents each). All other segments range from 21% to 28%.

Market Segments: With the exception of "Basic Research" (21% increase and 21% decrease) all of the segments represented by the respondents ranges from 31% to 34% for increase and 16% to 21% decrease.

About the Respondents (Questions 6-8)
These respondents identified their organizations. The distribution of the respondents' organizations includes:

Type of Organization	Percentages
Industry	39%
Hospital	10%
Government	13%
College/University	24%
Independent/Contract Lab	7%
Contract Research Organization/CRO	2%
Contract Manufacturing Organization/CMO	2%
Foundation/Non-Profit Organization	2%
Other	0%
Total	**100%**

Research was most frequently identified as the respondents department, followed by Central Service Laboratory Department, QA/QC and Development, respectively.

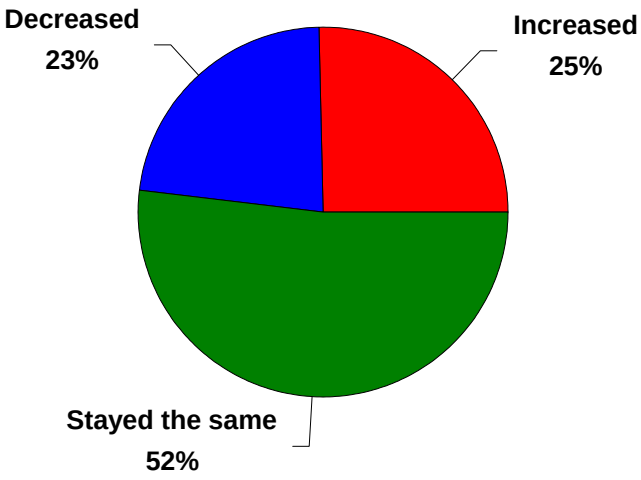
Departments	Percentages
Research	33%
Development	12%
Central Service Laboratory	22%
QA/QC	15%
Production/Process Control Monitoring	6%
Management (not lab)	4%
Purchasing	0%
Teaching/Education	8%
Other	0%
Total	**100%**

A wide variety of products/services were represented by the participants.

Products or Services	Responses
Agricultural Chemicals	50
Automotive/Defense/Aviation	37
Basic Research (not product related)	187
Bio-Pharmaceuticals	81
Biotechnology Products	83
Clinical/Diagnostics	137
Consumer Products	55
Education	157
Electronic Instruments/Semiconductors	20
Environmental/Water	135
Food/Beverages/Flavors	56
Forensics/Toxicology	51
Homeland Security	12
Inorganic Chemicals	51
Metals/Metal Products	36
Organic Chemicals	76
Paper/Pulp	16
Petrochemicals	35
Petroleum	25
Non-Petroleum/Fuels/Energy	24
Pharmaceuticals	99
Pharmaceuticals Generic/BioGeneric	36
Pigments and Dyes	17
Polymers/Paints/Coatings	67
Recycling	7
Renewable Energy	14
Service Laboratory	123
Other	0

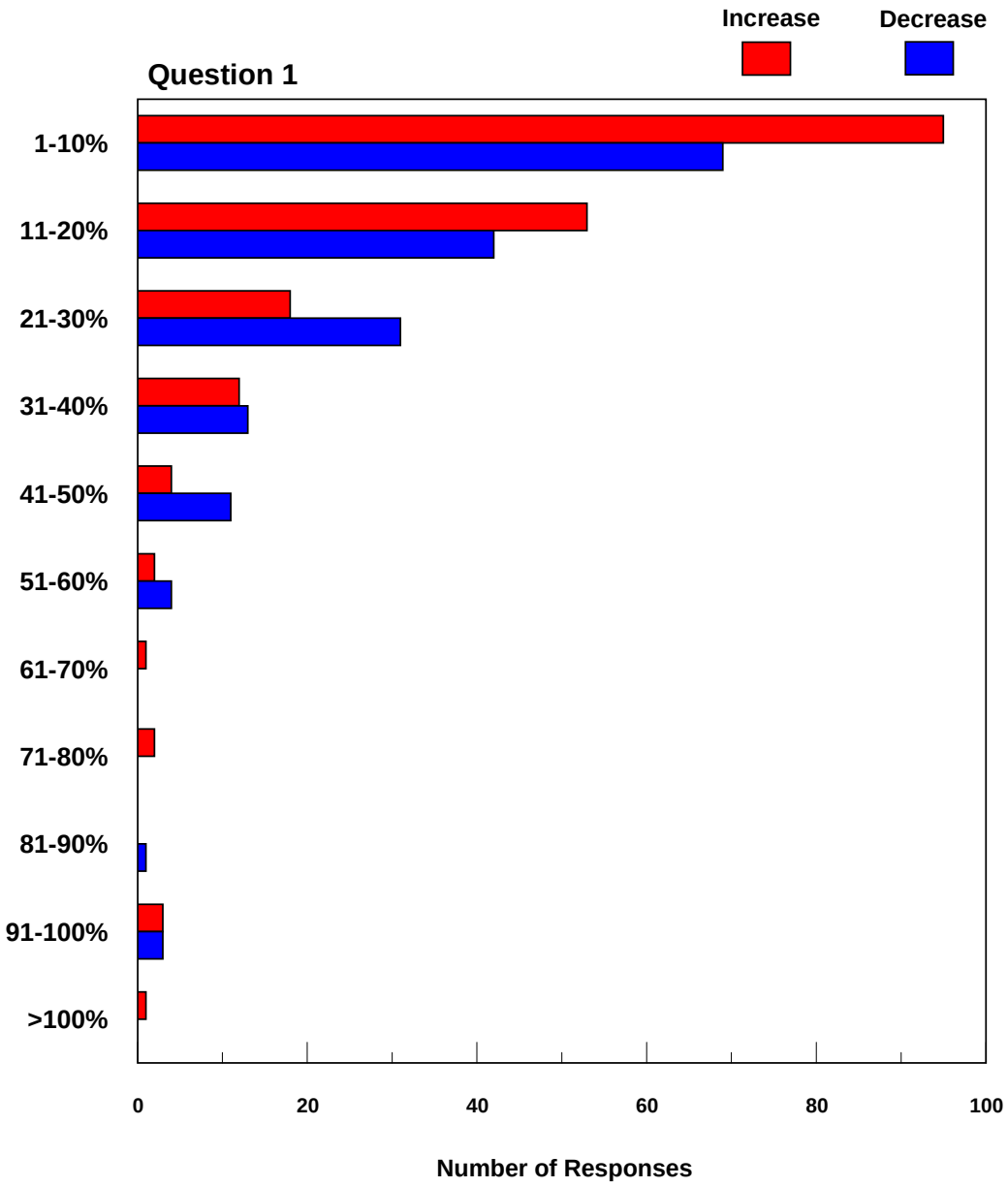
Laboratory Personnel Description

N = 796

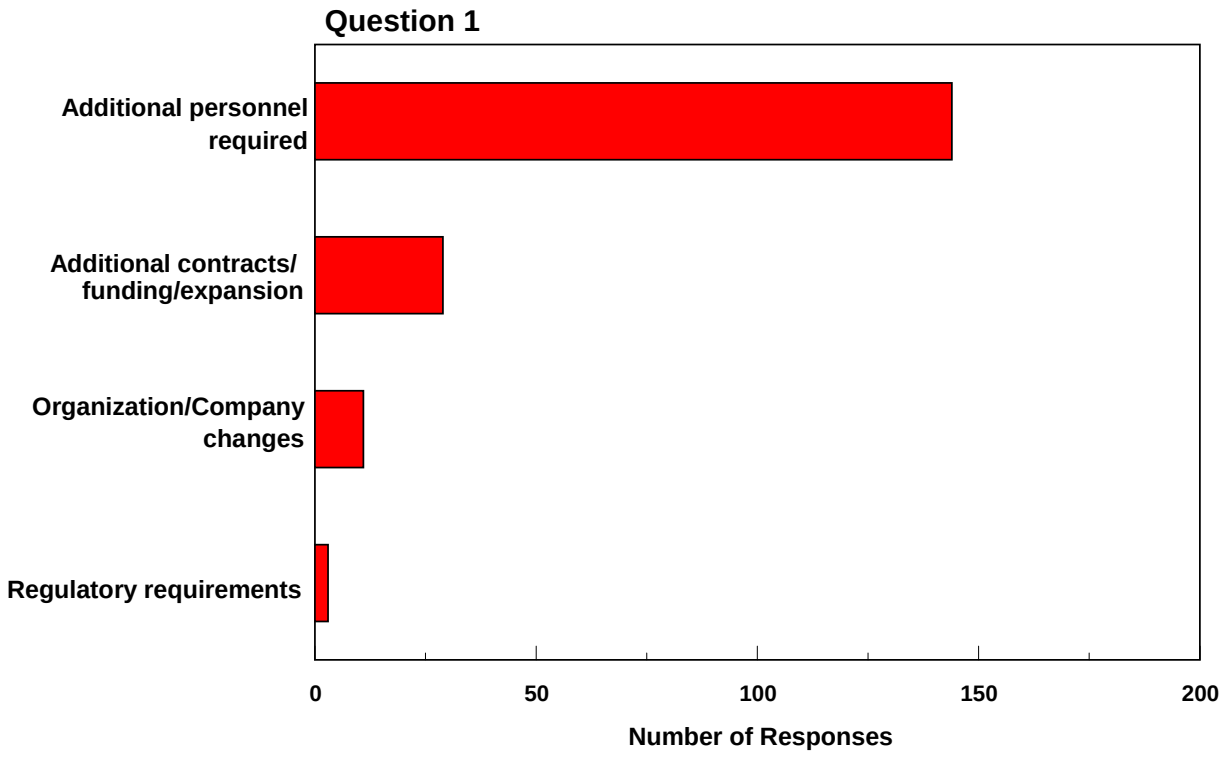


Question 1

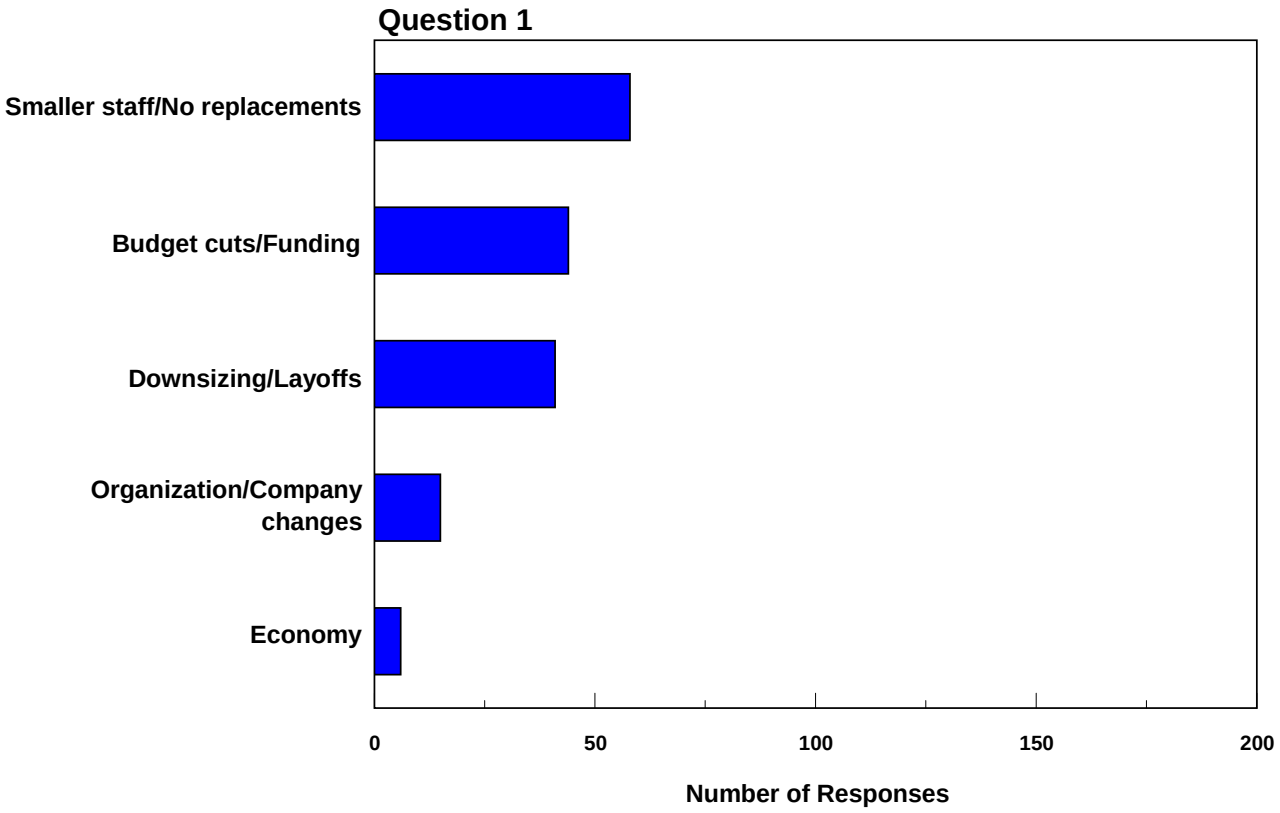
Percentage of Increase or Decrease in Laboratory Personnel



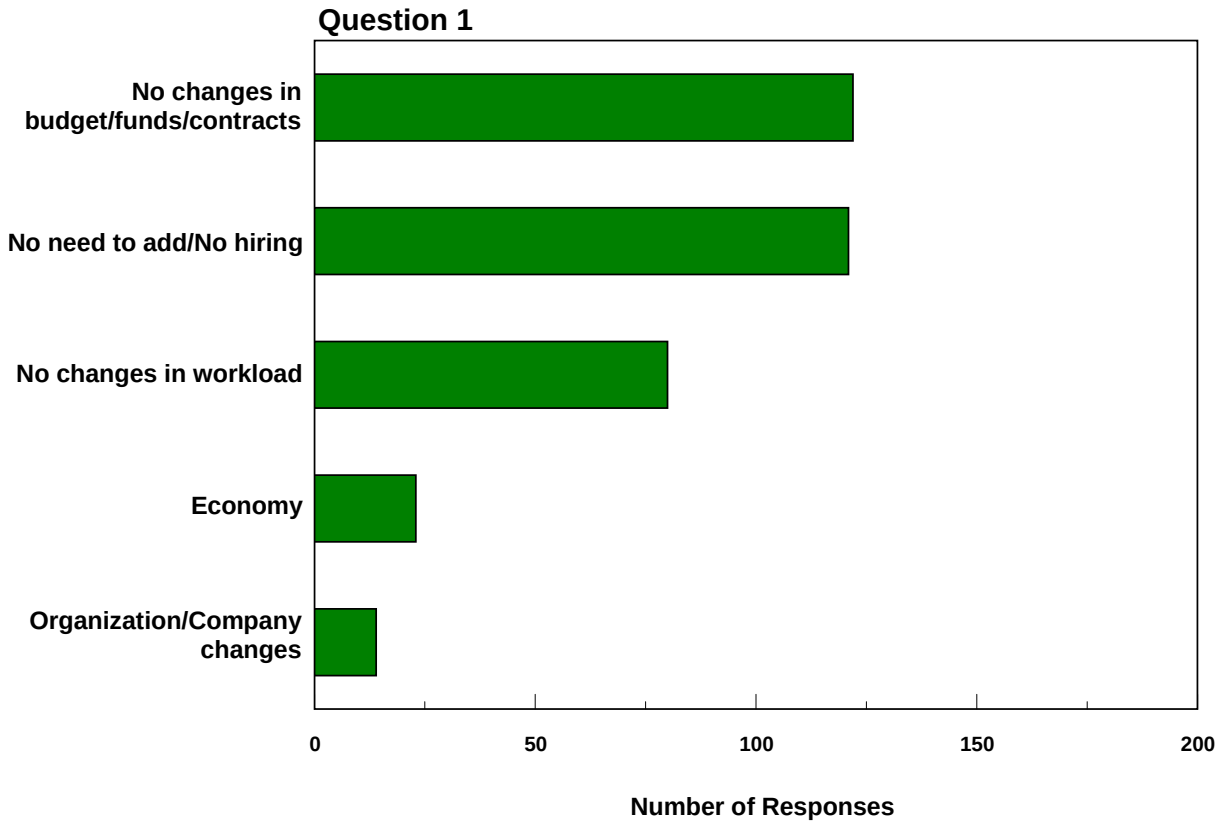
Reasons for Increase in Laboratory Personnel



Reasons for Decrease in Laboratory Personnel

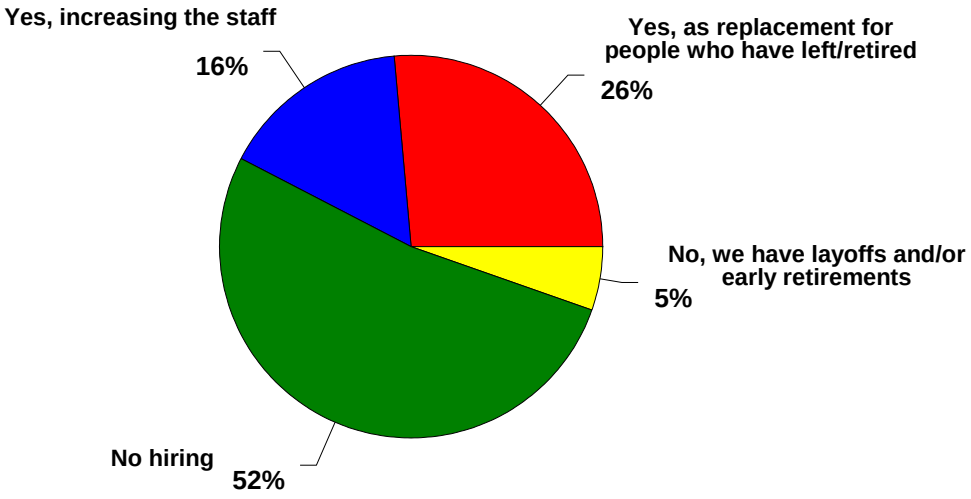


Reasons for No Change in Laboratory Personnel



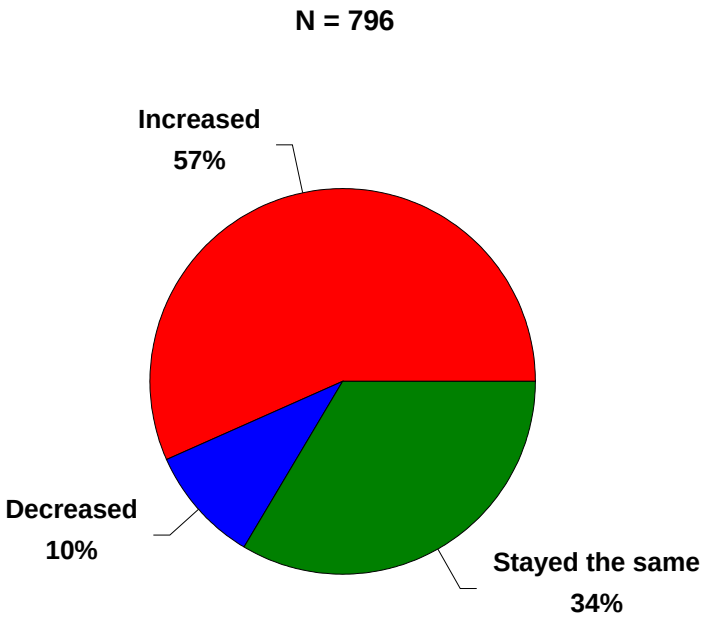
Hiring New People for the Laboratory

N = 802



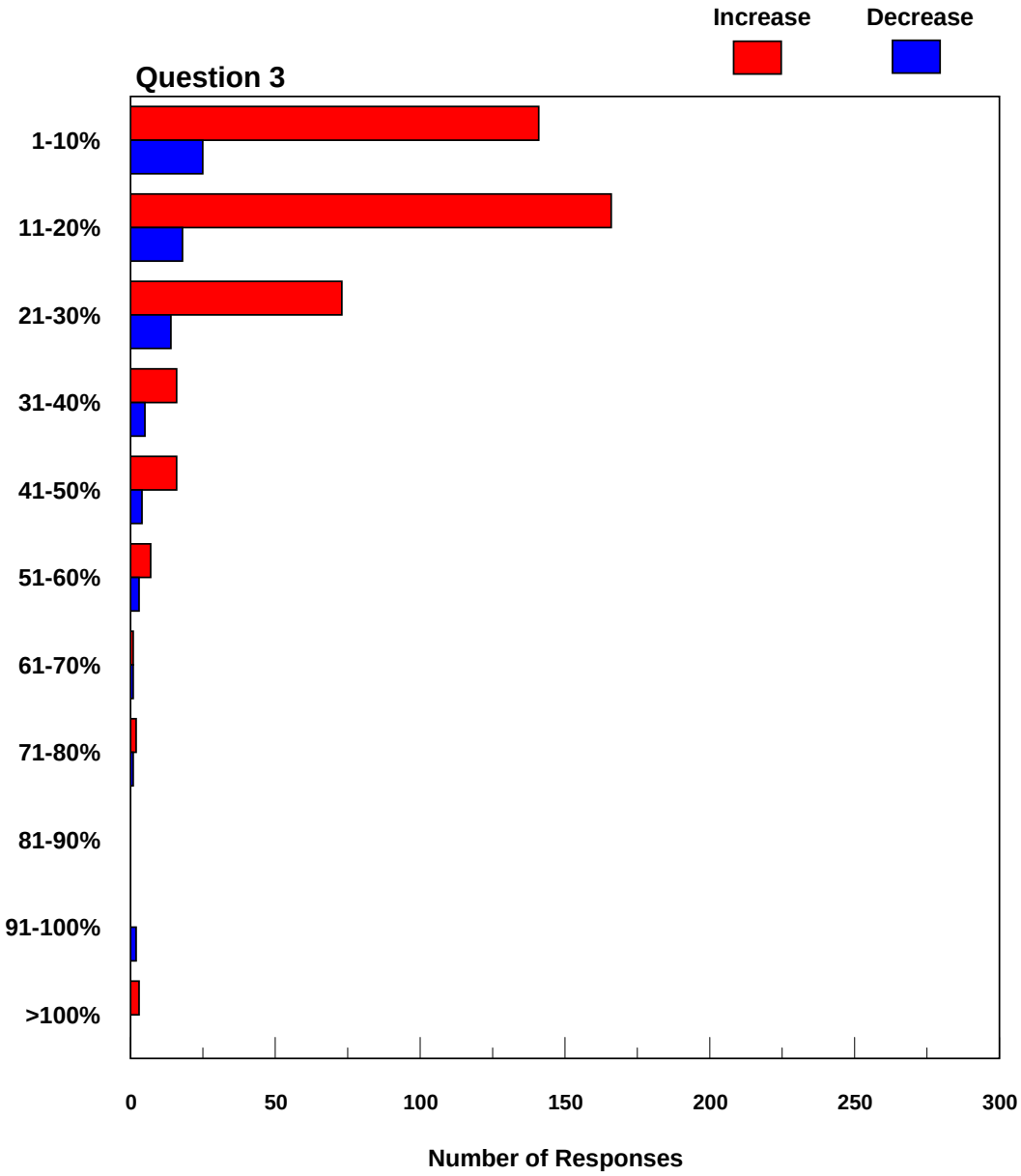
Question 2

Workload Description

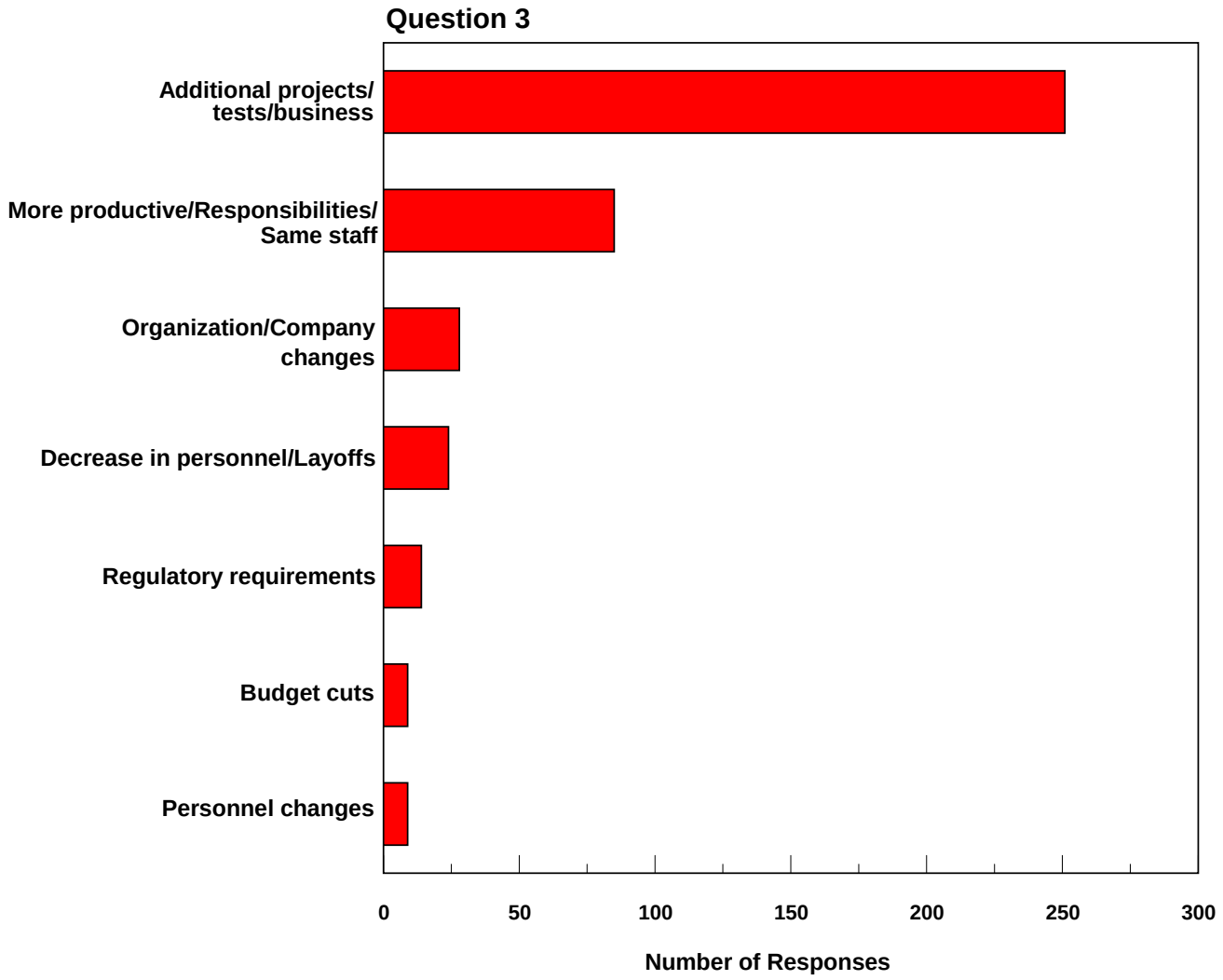


Question 3

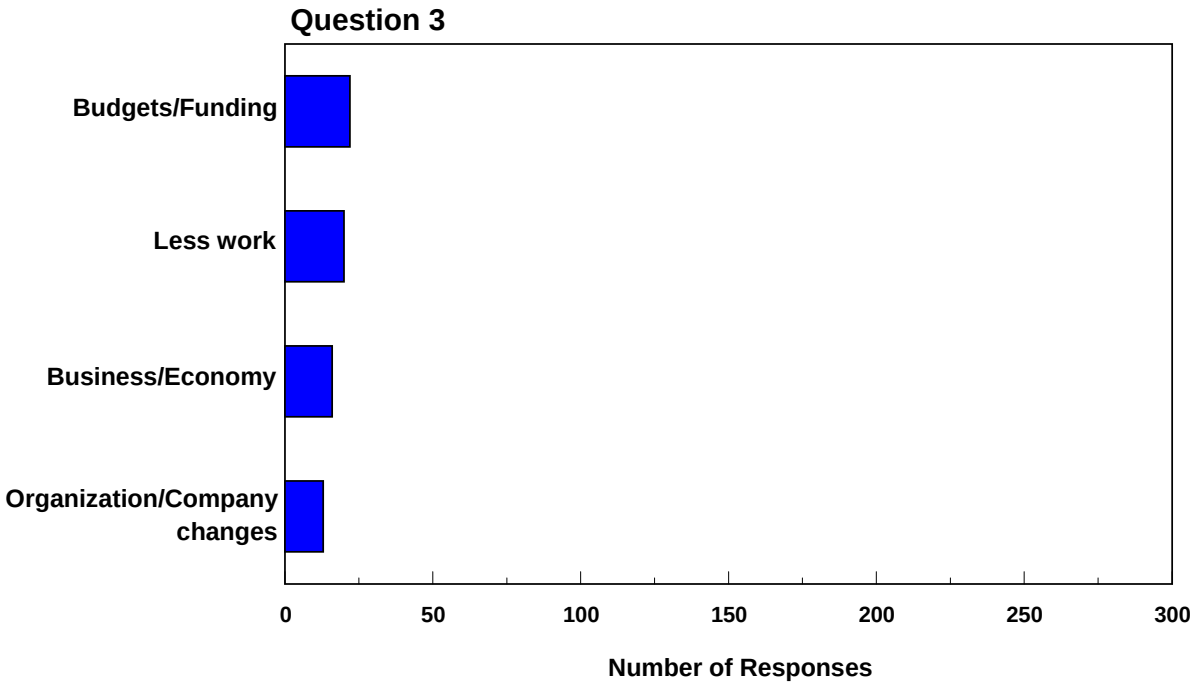
Percentage of Increase or Decrease in Workload



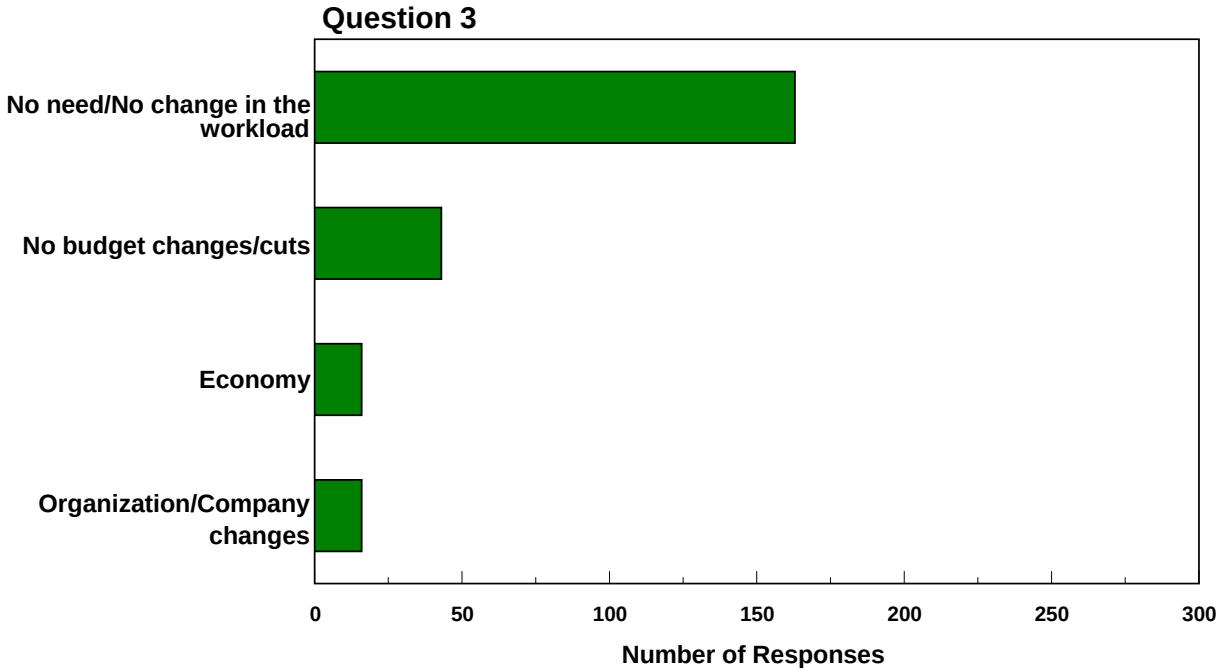
Reasons for Increase in Workload



Reasons for Decrease in Workload



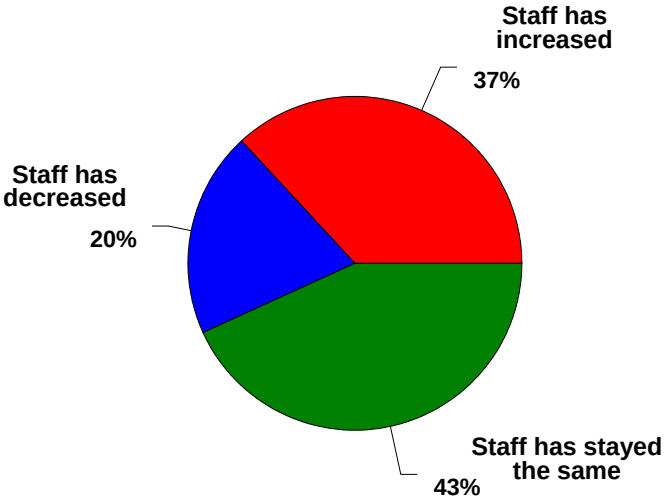
Reasons for No Change in Workload



Laboratory Personnel Description

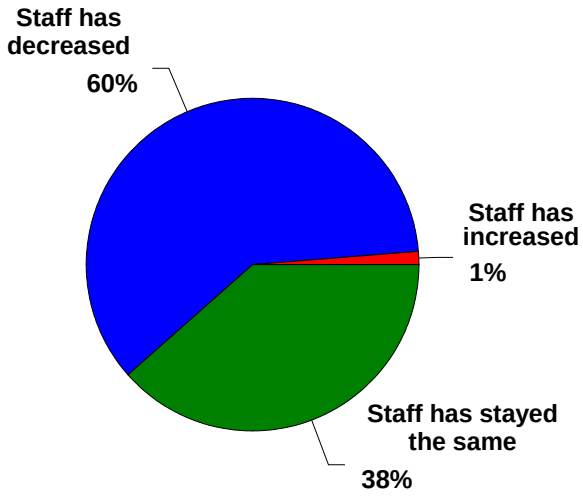
If Workload Has Increased

N = 447



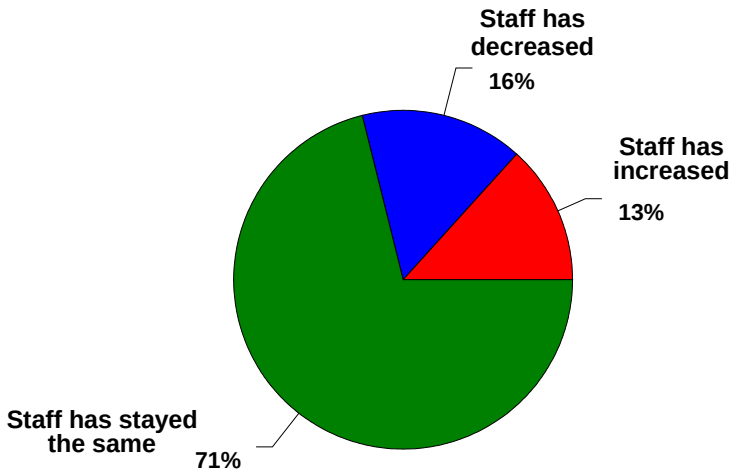
If Workload Has Decreased

N = 78



If Workload Has Stayed the Same

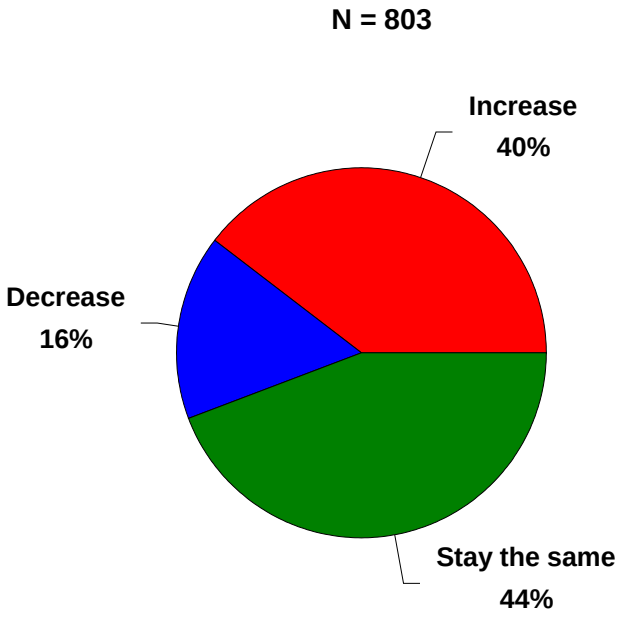
N = 263



Questions 1 and 3

Spending for Laboratory Products for Fiscal 2014 When Compared to 2013

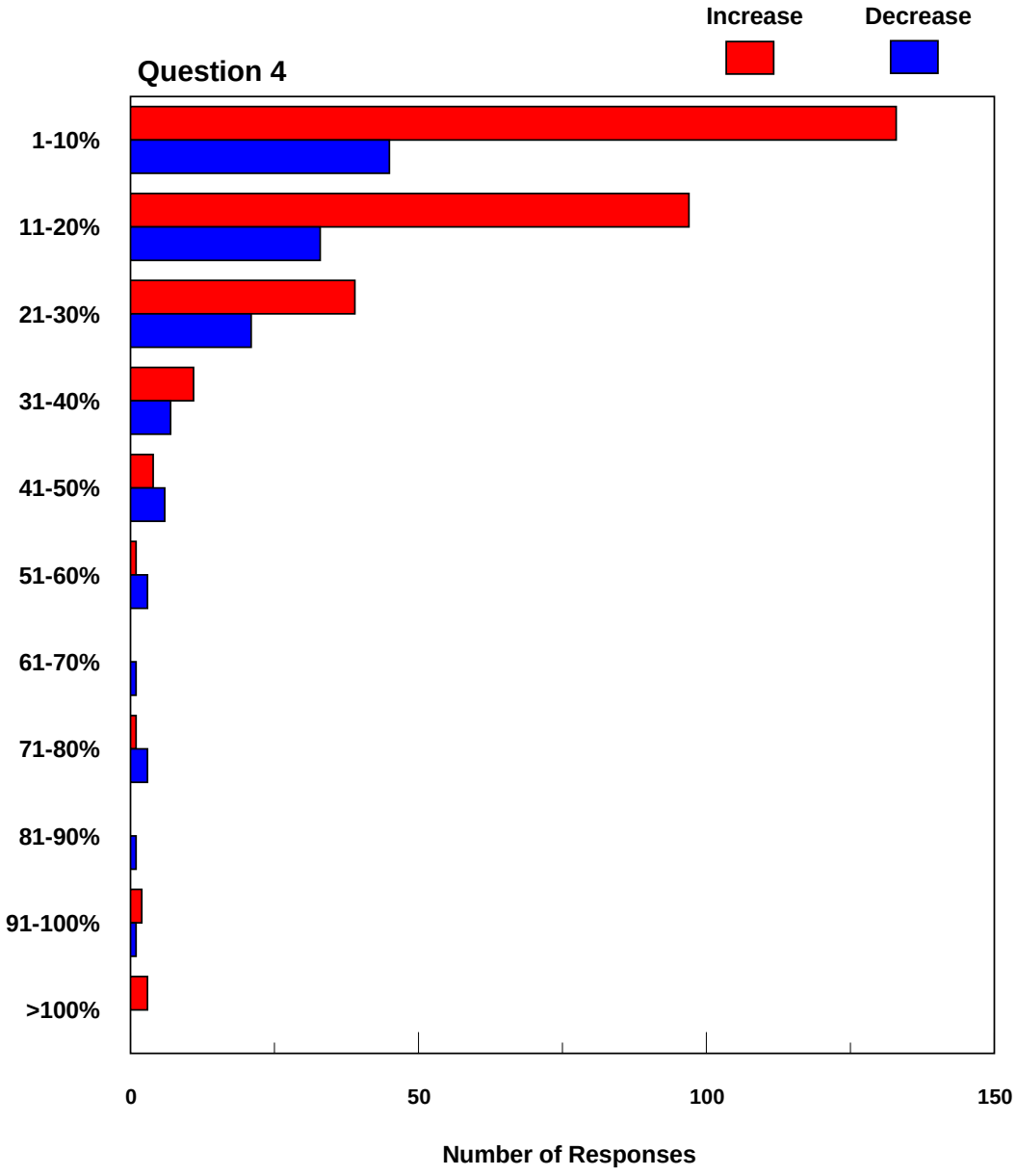
Chemicals, Reagents, Solvents



Question 4

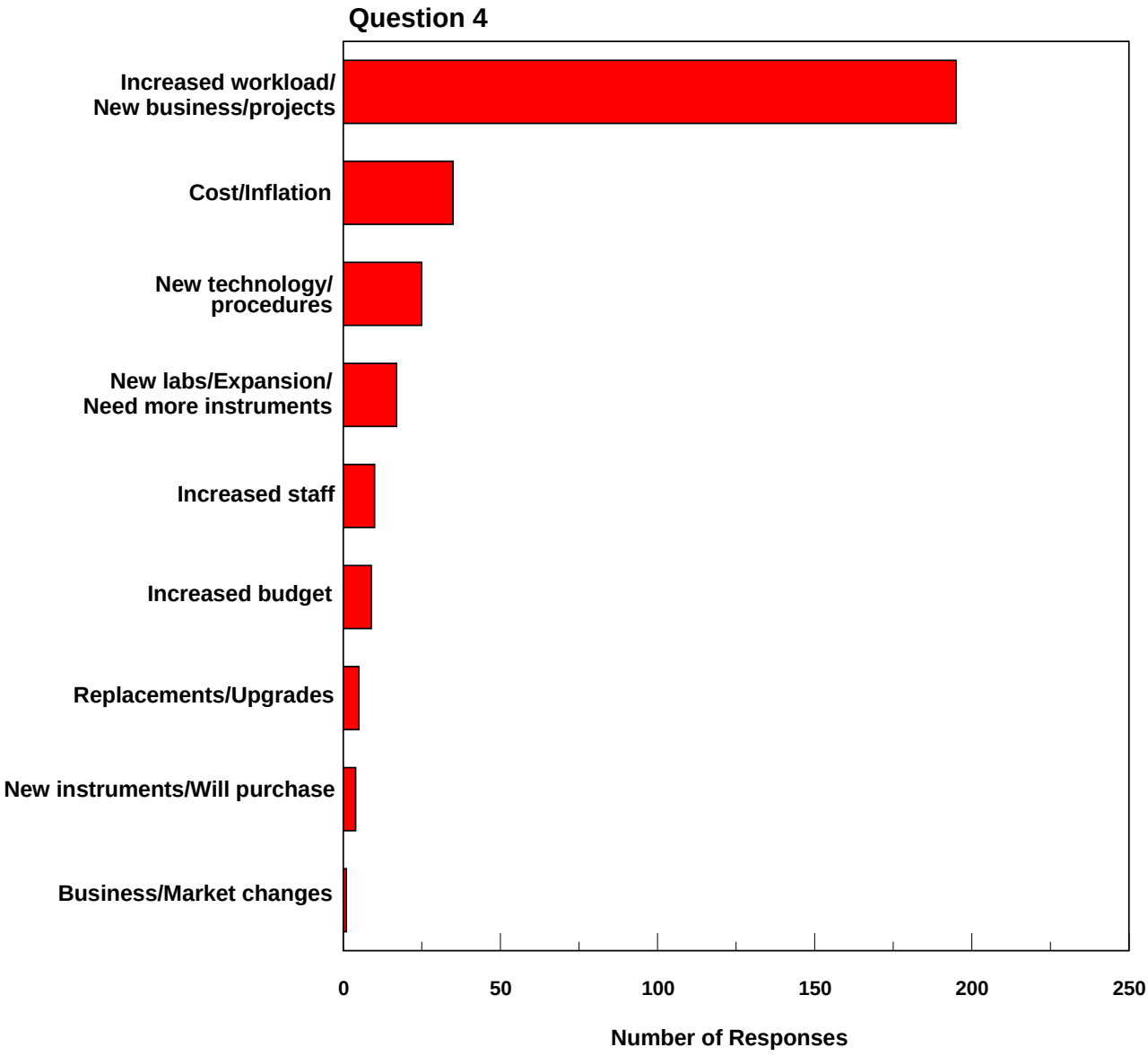
Percentage of Increase or Decrease in Spending for Laboratory Products

Chemicals, Reagents, Solvents



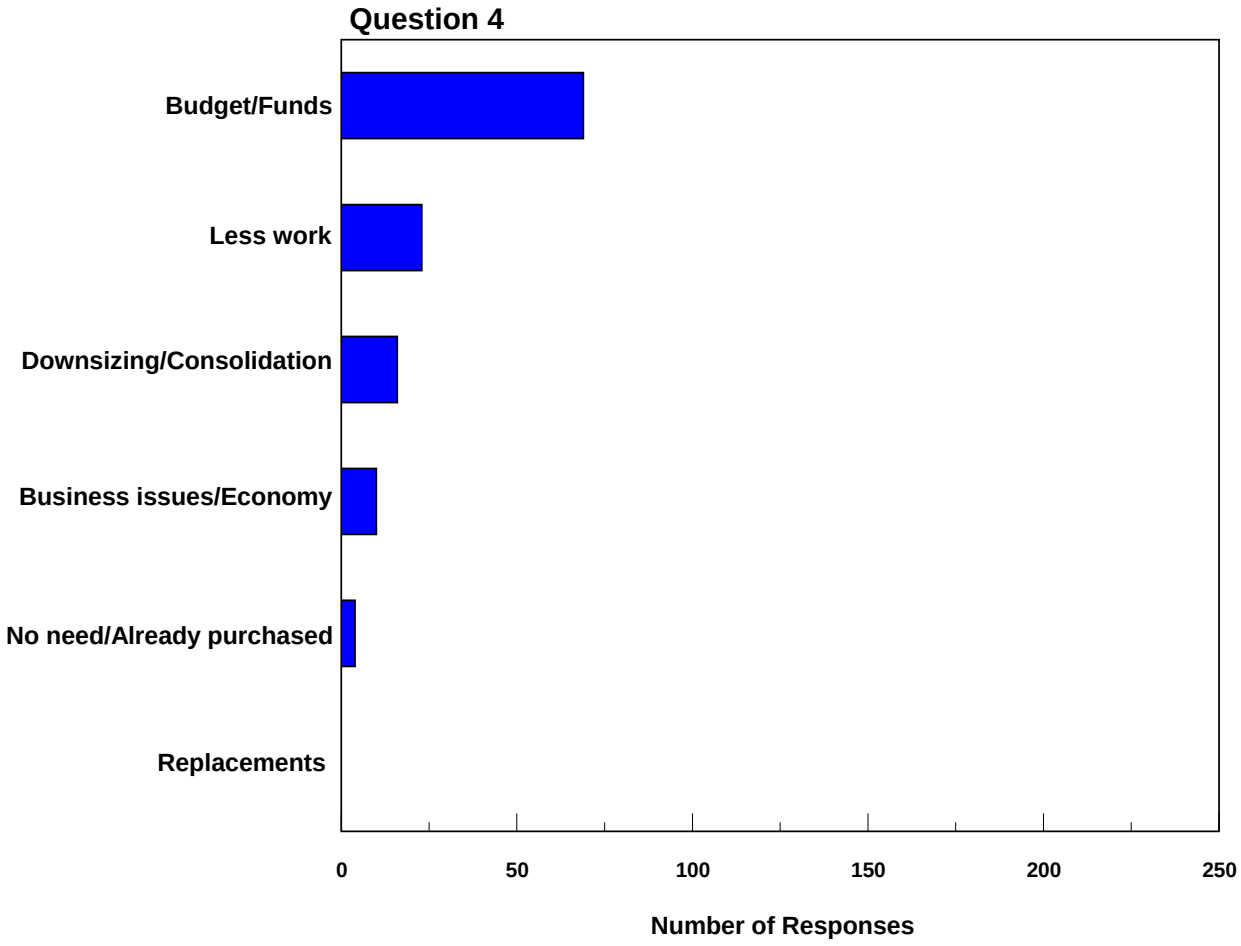
Reasons for Increase in Spending for Laboratory Products

Chemicals, Reagents, Solvents



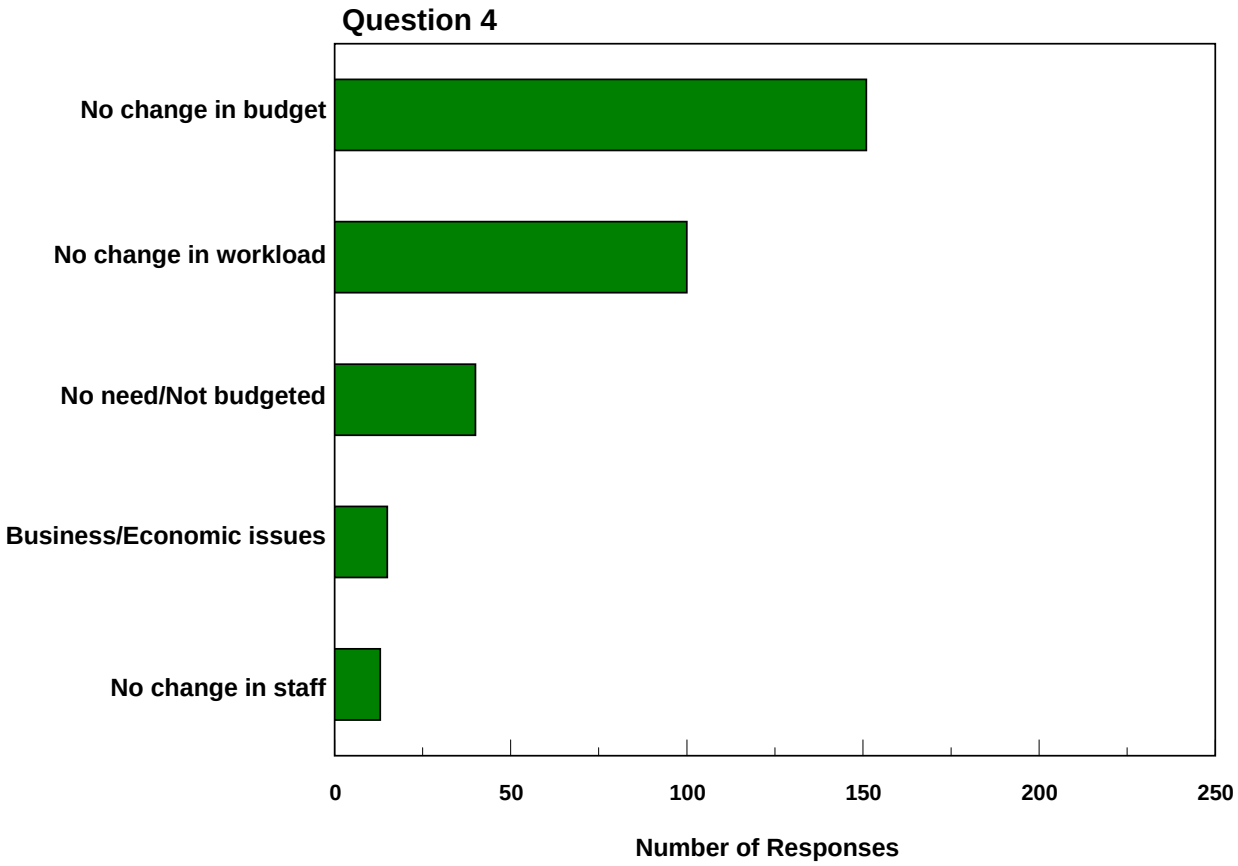
Reasons for Decrease in Spending for Laboratory Products

Chemicals, Reagents, Solvents



Reasons for No Change in Spending for Laboratory Products

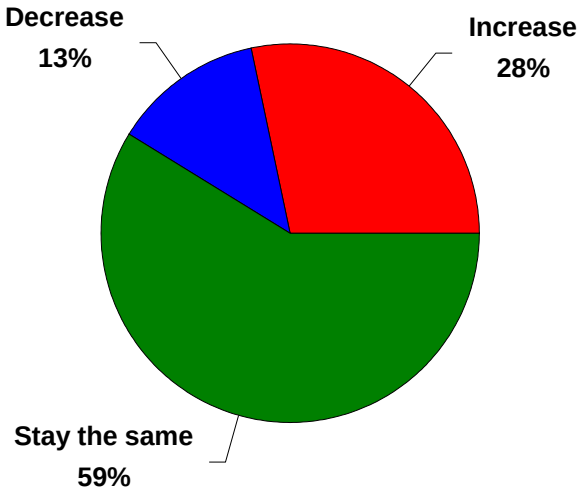
Chemicals, Reagents, Solvents



Spending for Laboratory Products for Fiscal 2014 When Compared to 2013

Glassware, Plasticware

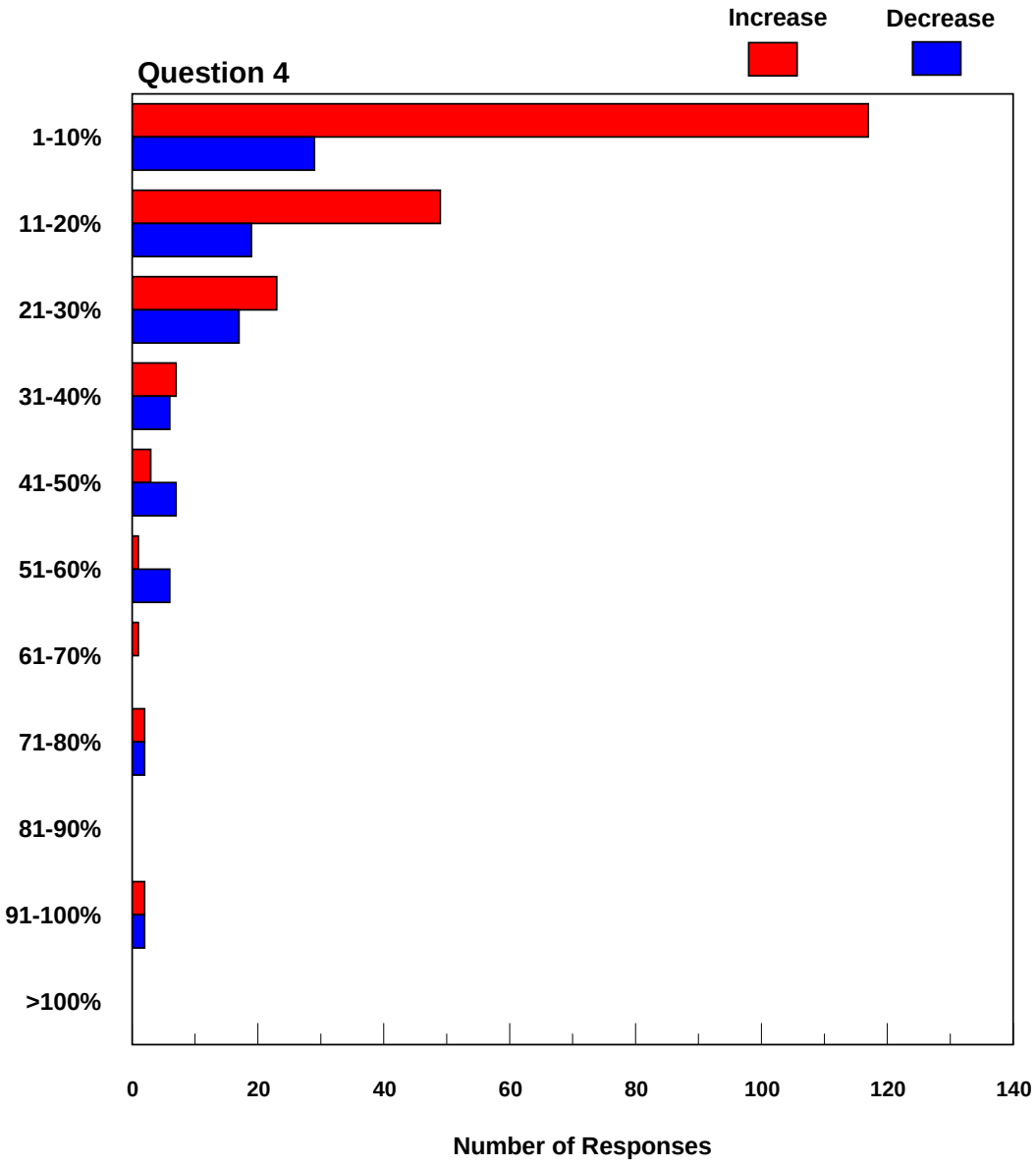
N = 798



Question 4

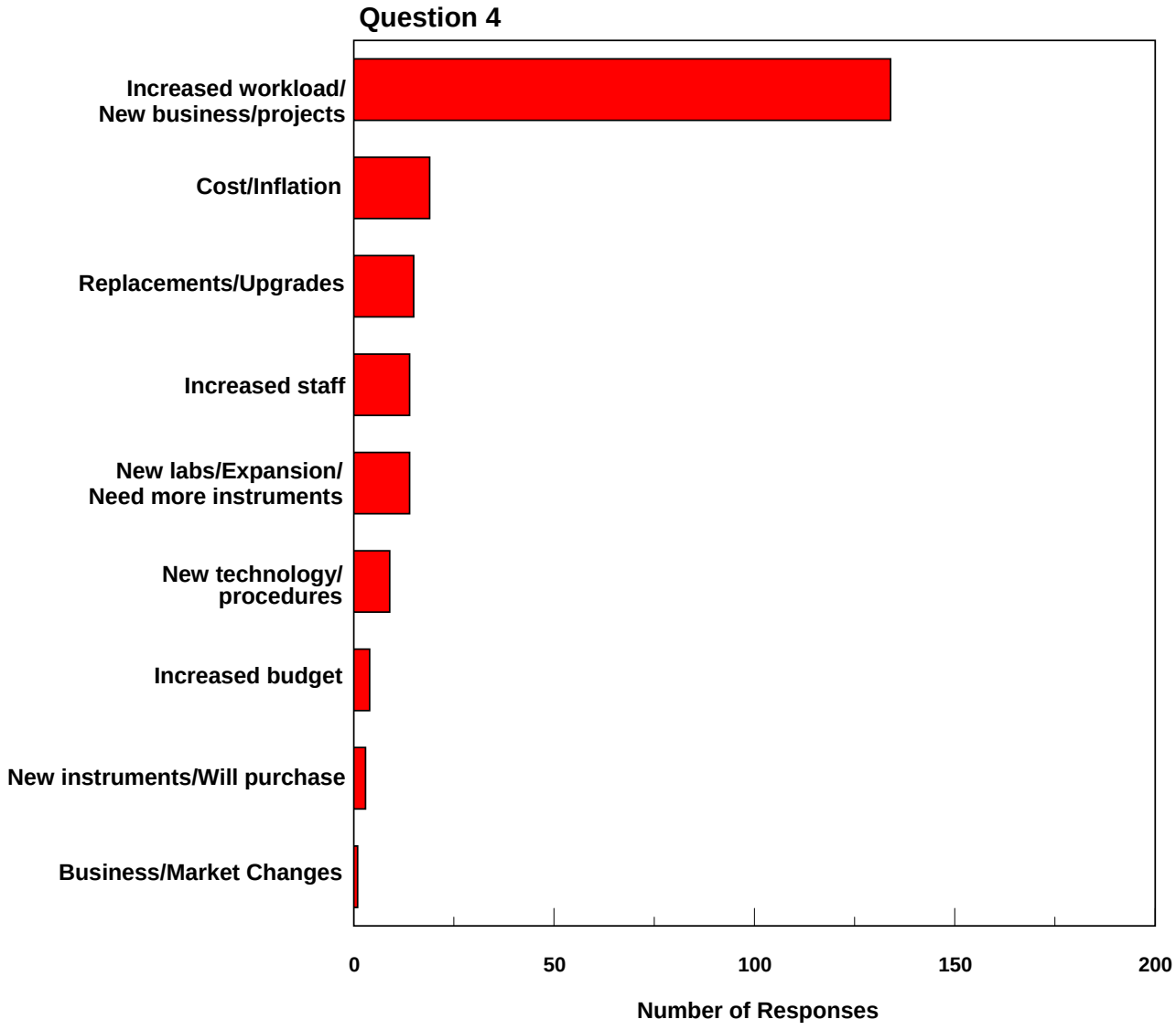
Percentage of Increase or Decrease in Spending for Laboratory Products

Glassware, Plasticware



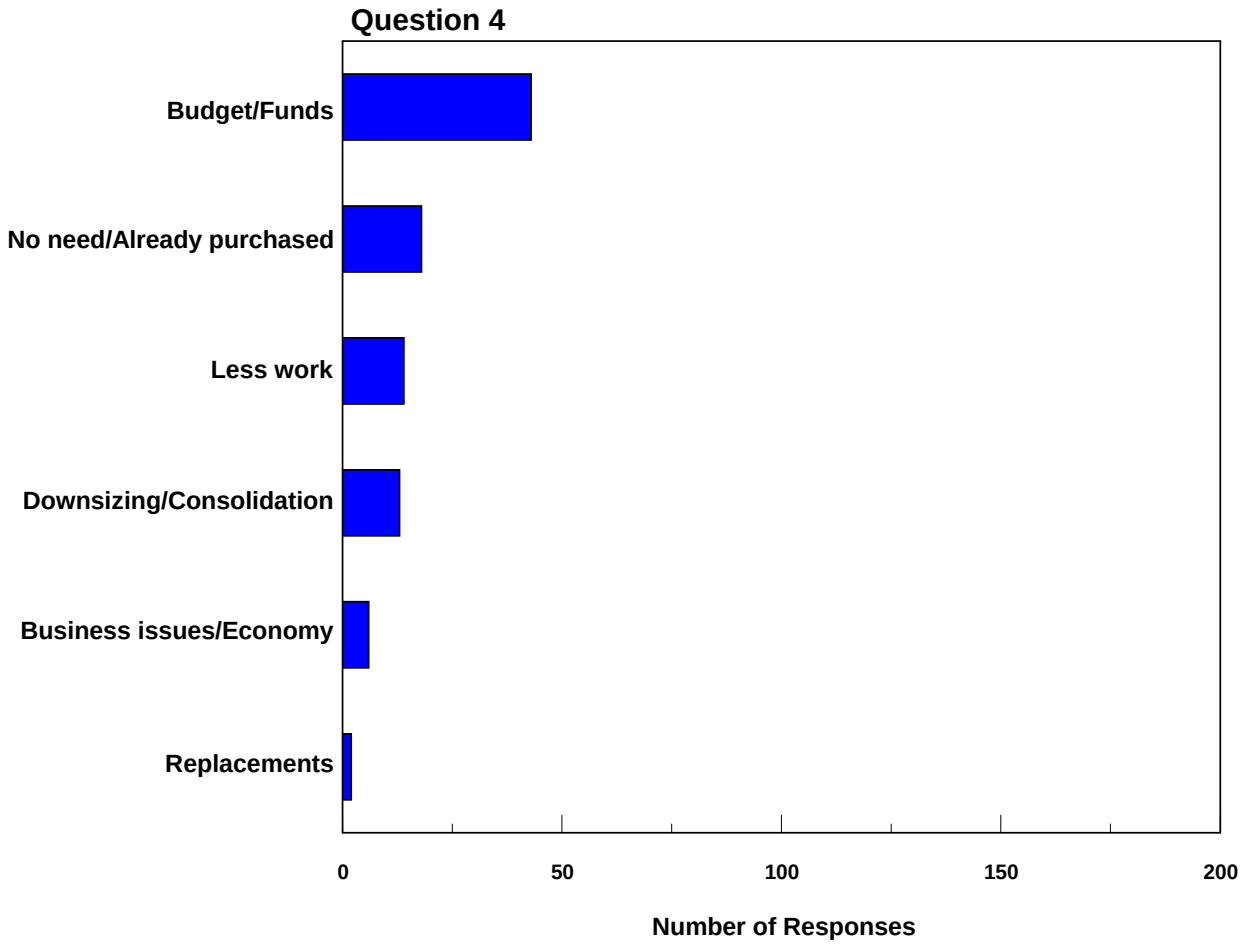
Reasons for Increase in Spending for Laboratory Products

Glassware, Plasticware



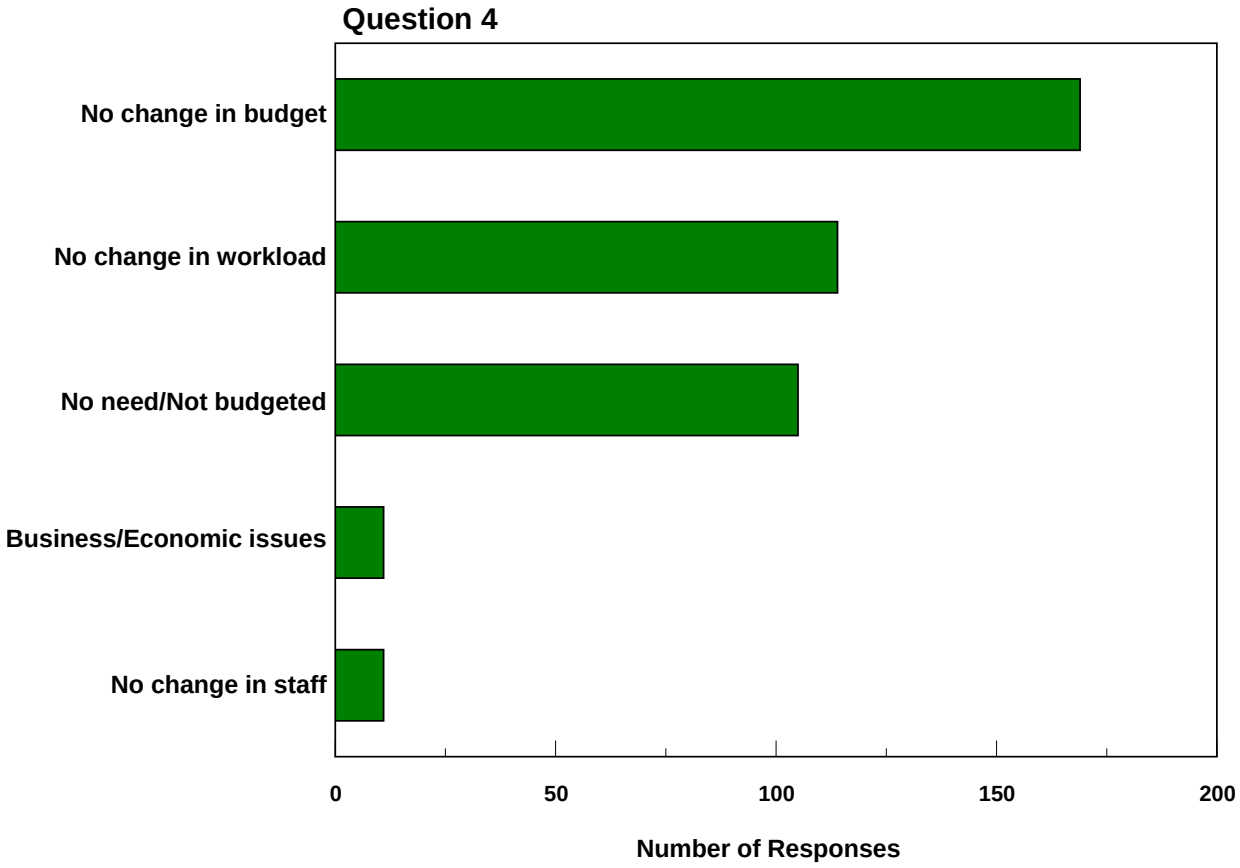
Reasons for Decrease in Spending for Laboratory Products

Glassware, Plasticware



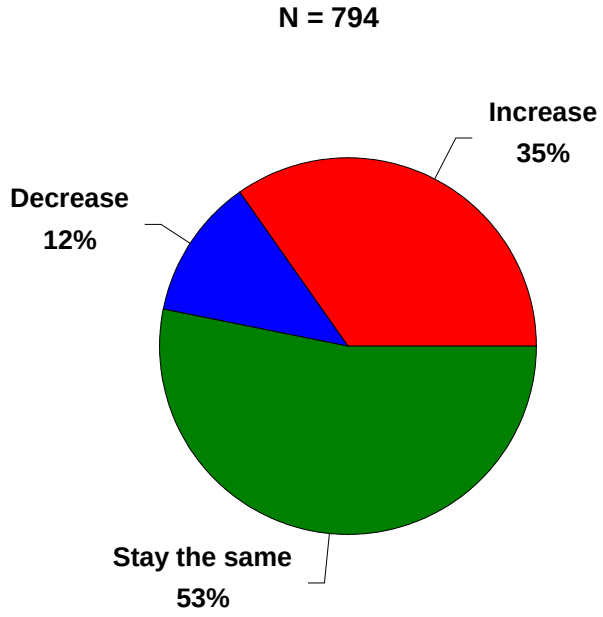
Reasons for No Change in Spending for Laboratory Products

Glassware, Plasticware



Spending for Laboratory Products for Fiscal 2014 When Compared to 2013

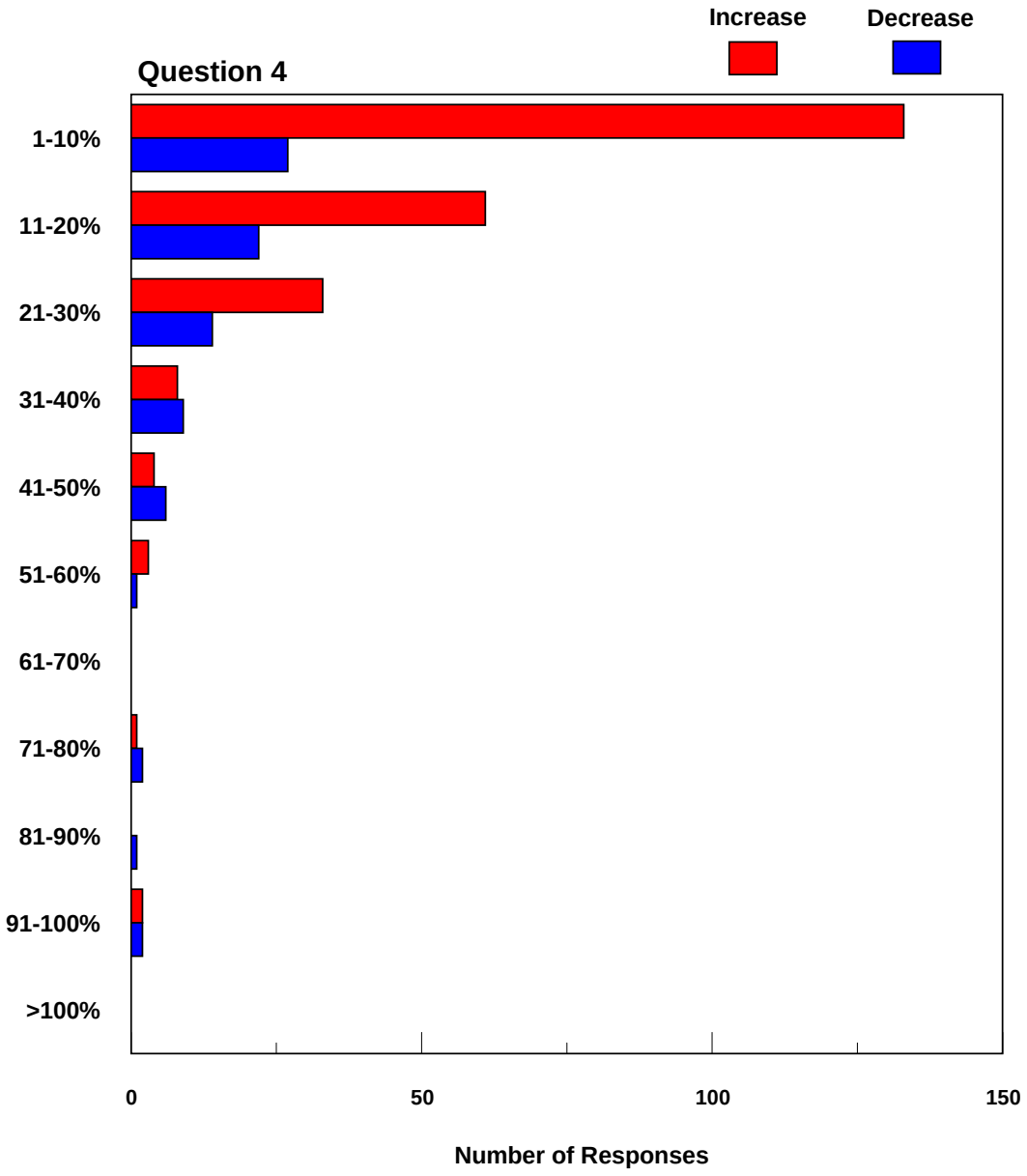
Consumables Excluding Chemicals



Question 4

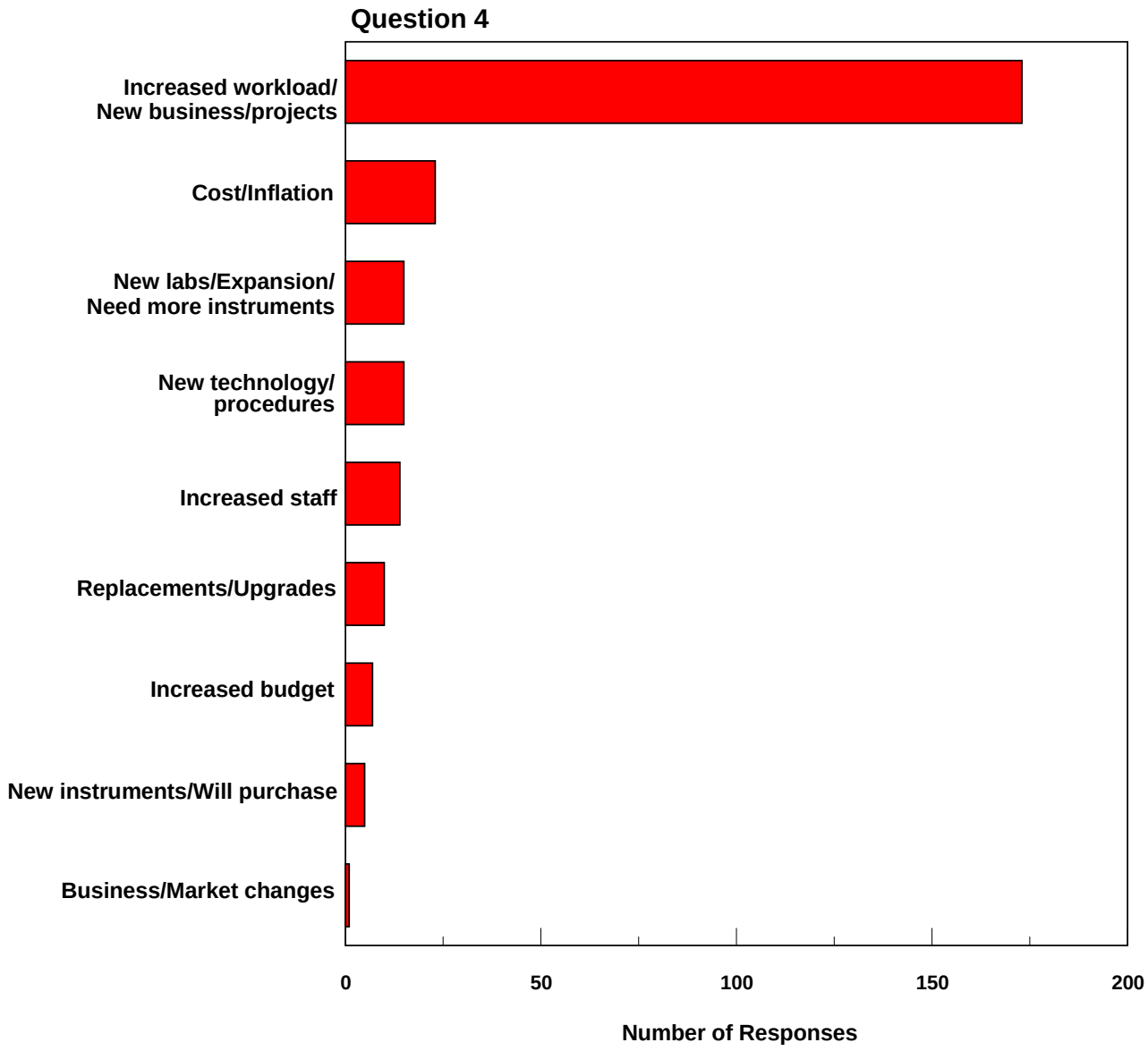
Percentage of Increase or Decrease in Spending for Laboratory Products

Consumables Excluding Chemicals



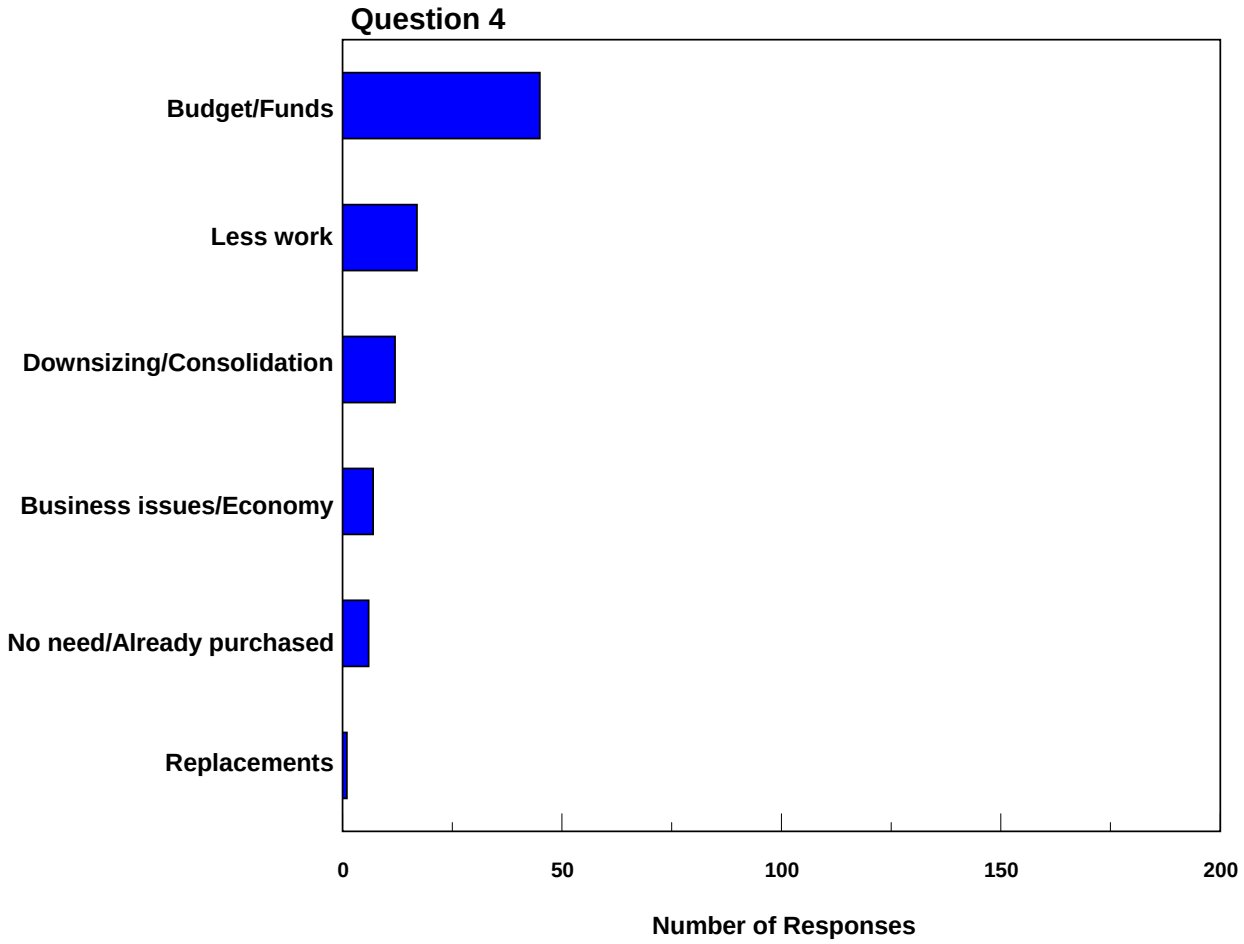
Reasons for Increase in Spending for Laboratory Products

Consumables Excluding Chemicals



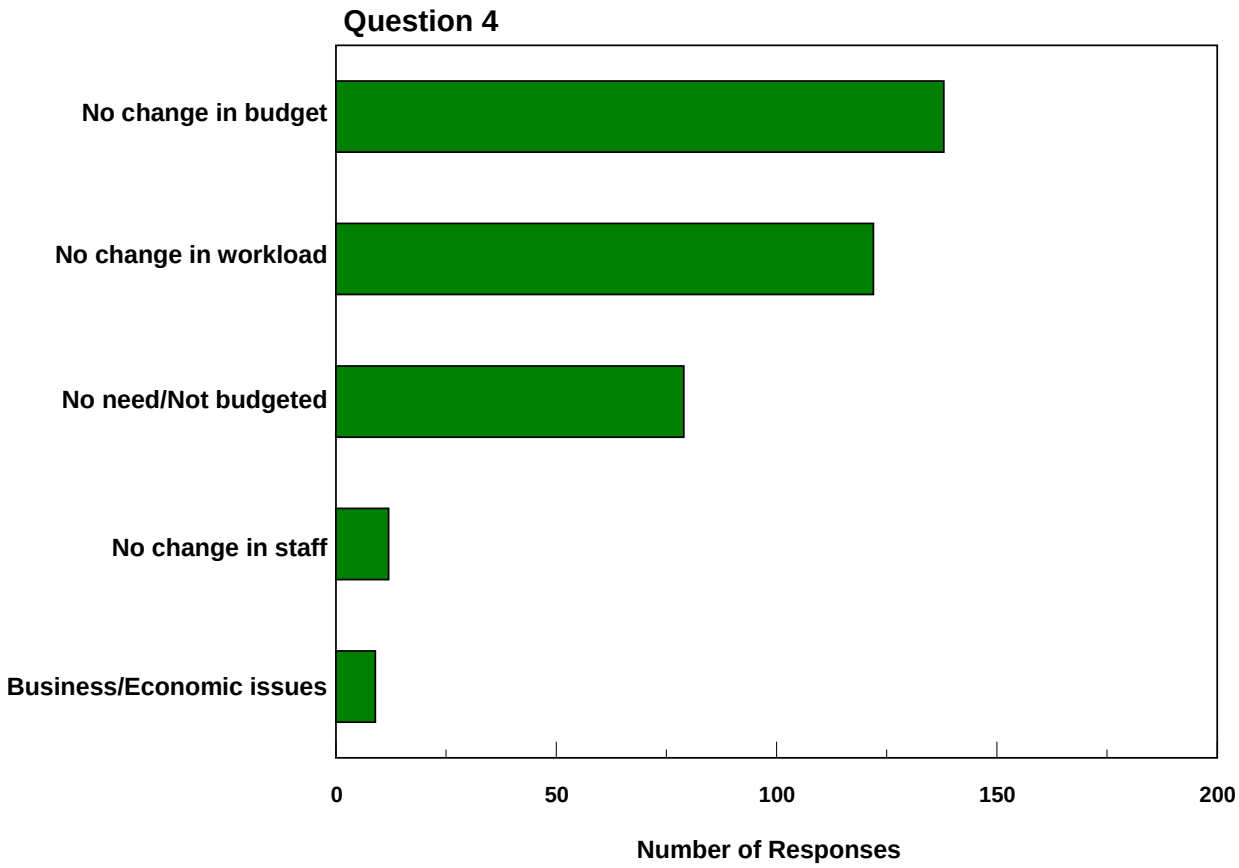
Reasons for Decrease in Spending for Laboratory Products

Consumables Excluding Chemicals



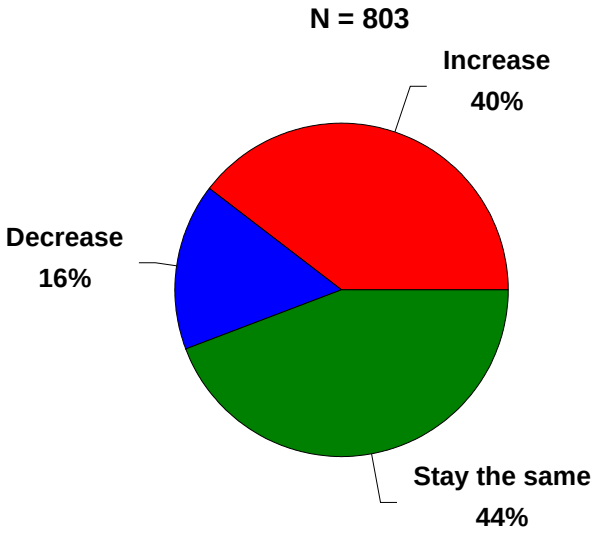
Reasons for No Change in Spending for Laboratory Products

Consumables Excluding Chemicals

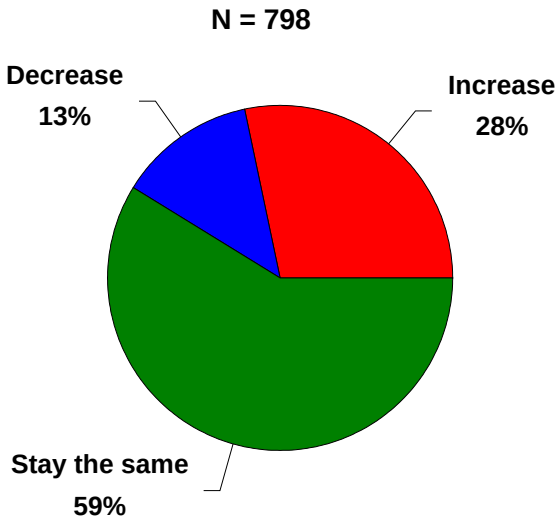


Spending for Laboratory Products for Fiscal 2014 When Compared to 2013

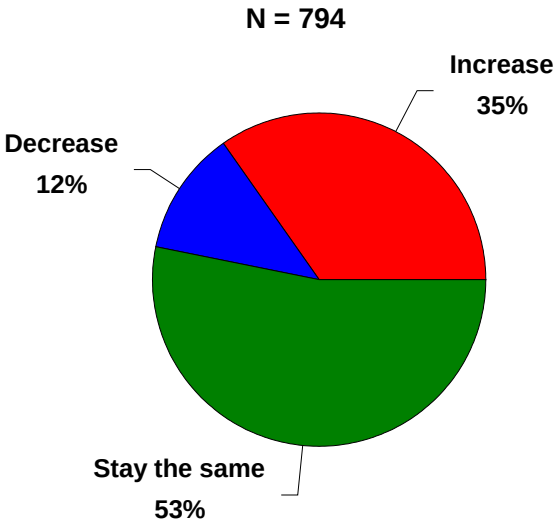
Chemicals, Reagents, Solvents



Glassware, Plasticware



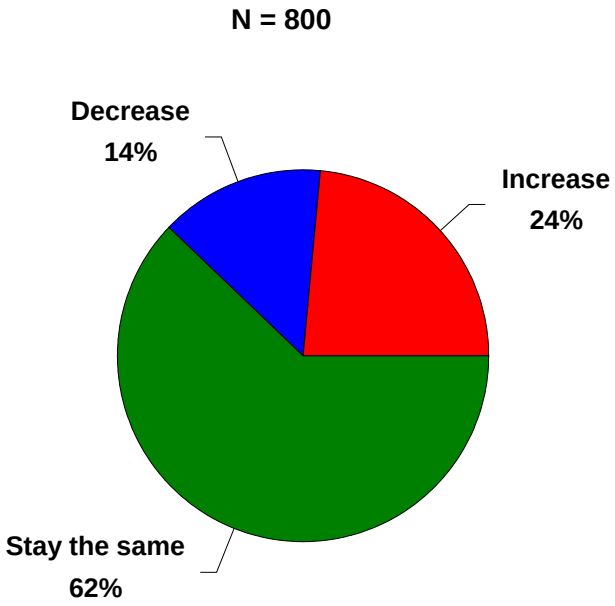
Consumables Excluding Chemicals



Question 4

Spending for Laboratory Products for Fiscal 2014 When Compared to 2013

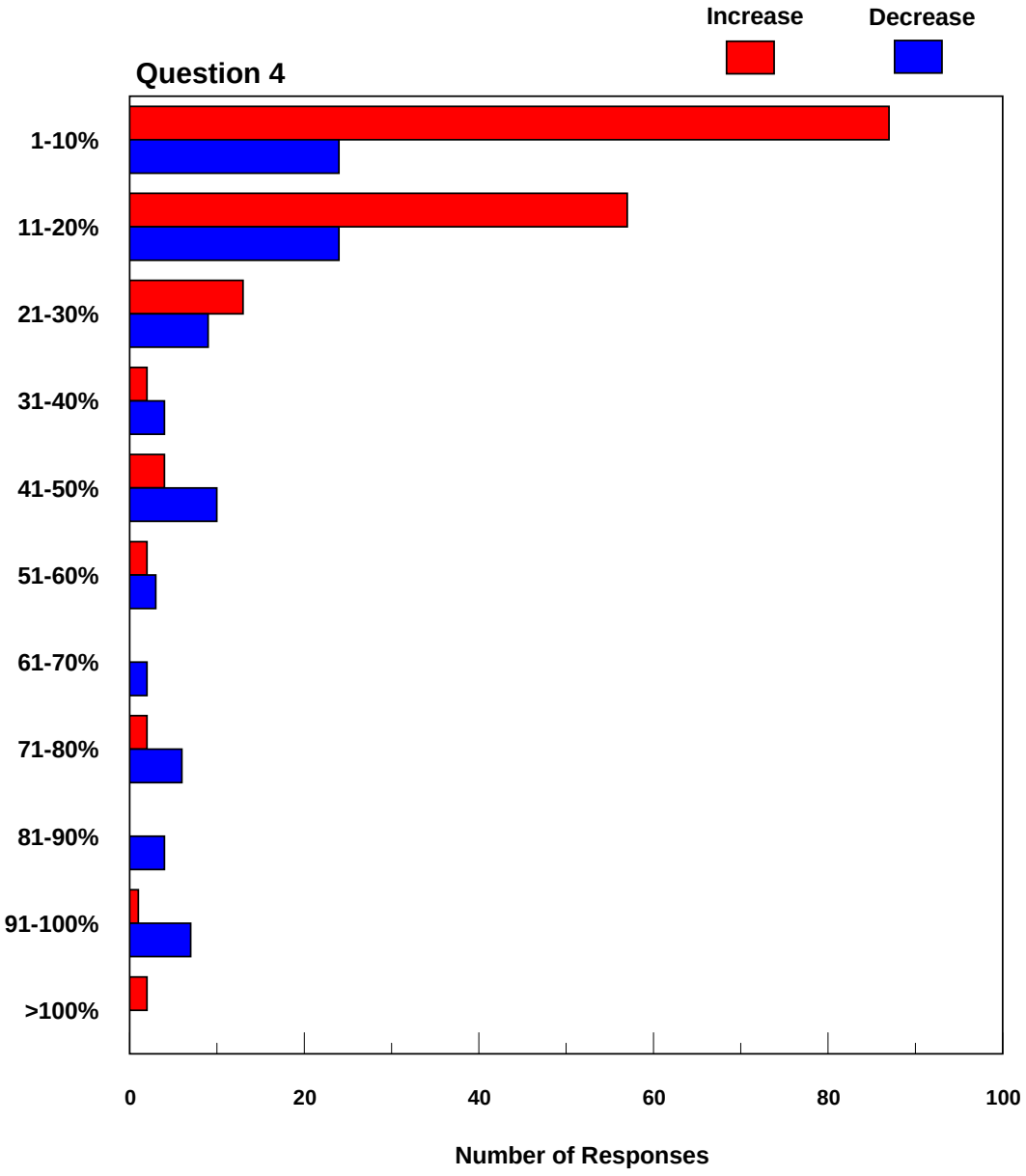
Laboratory Equipment <$2,500



Question 4

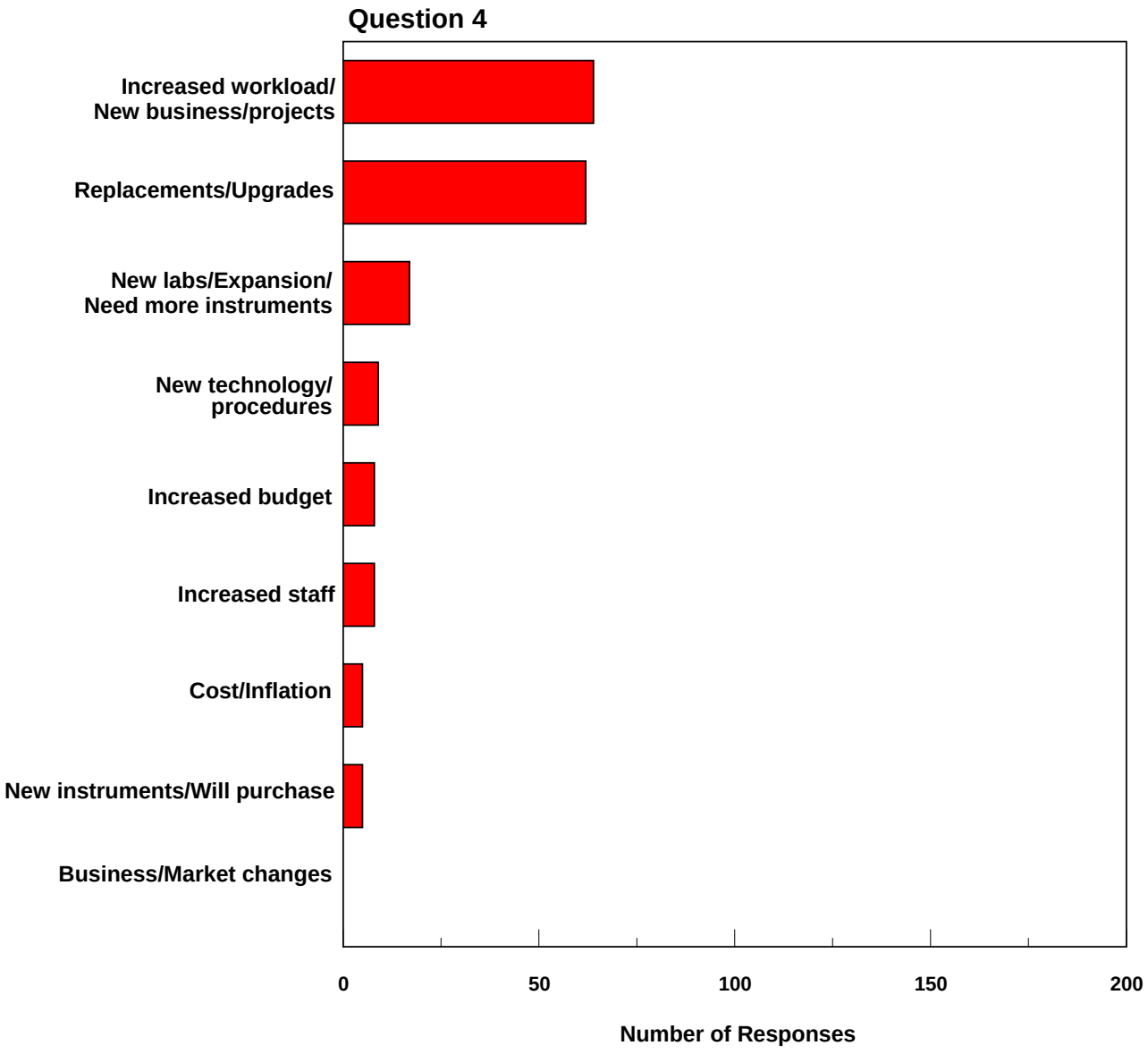
Percentage of Increase or Decrease in Spending for Laboratory Products

Laboratory Equipment <$2,500



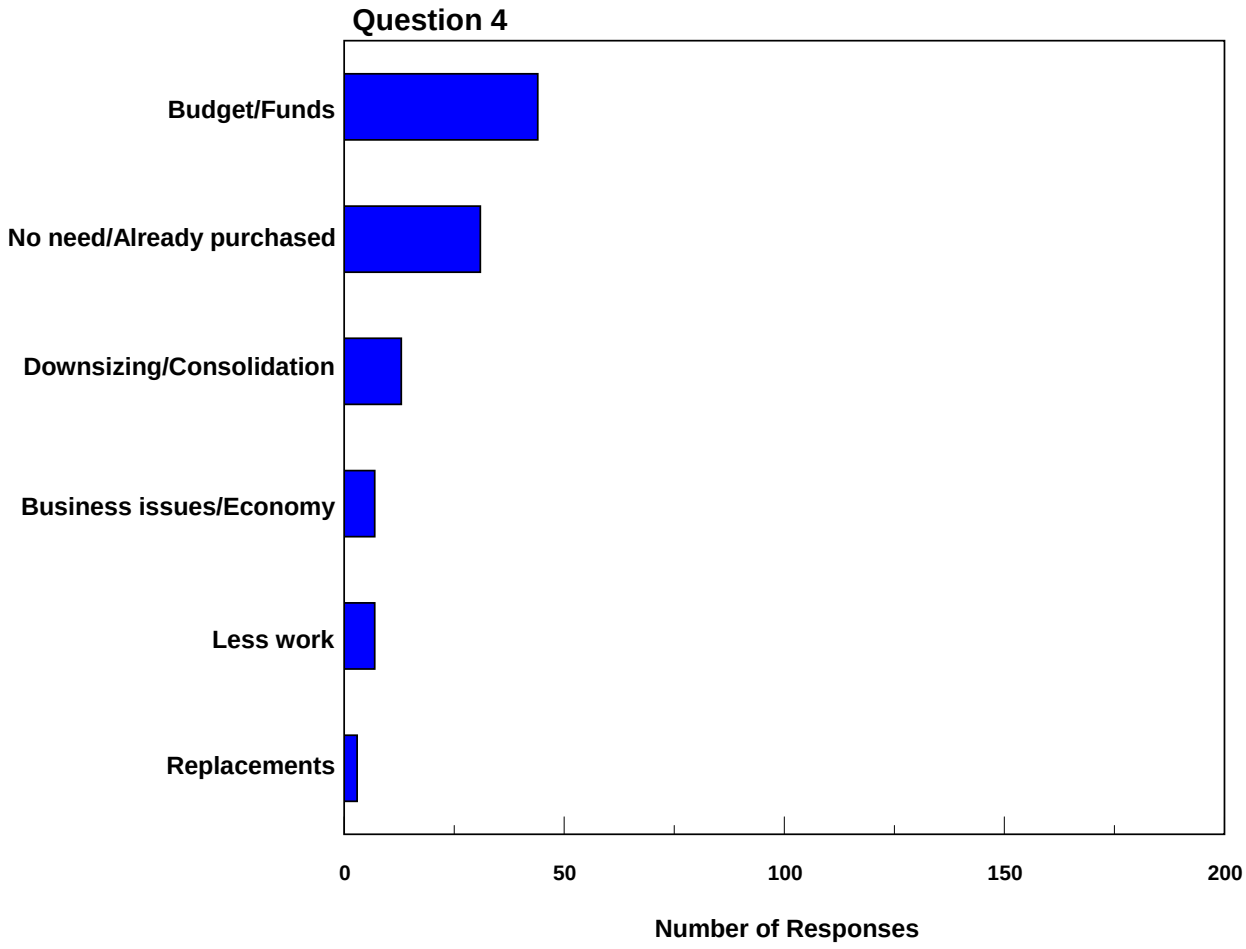
Reasons for Increase in Spending for Laboratory Products

Laboratory Equipment <$2,500



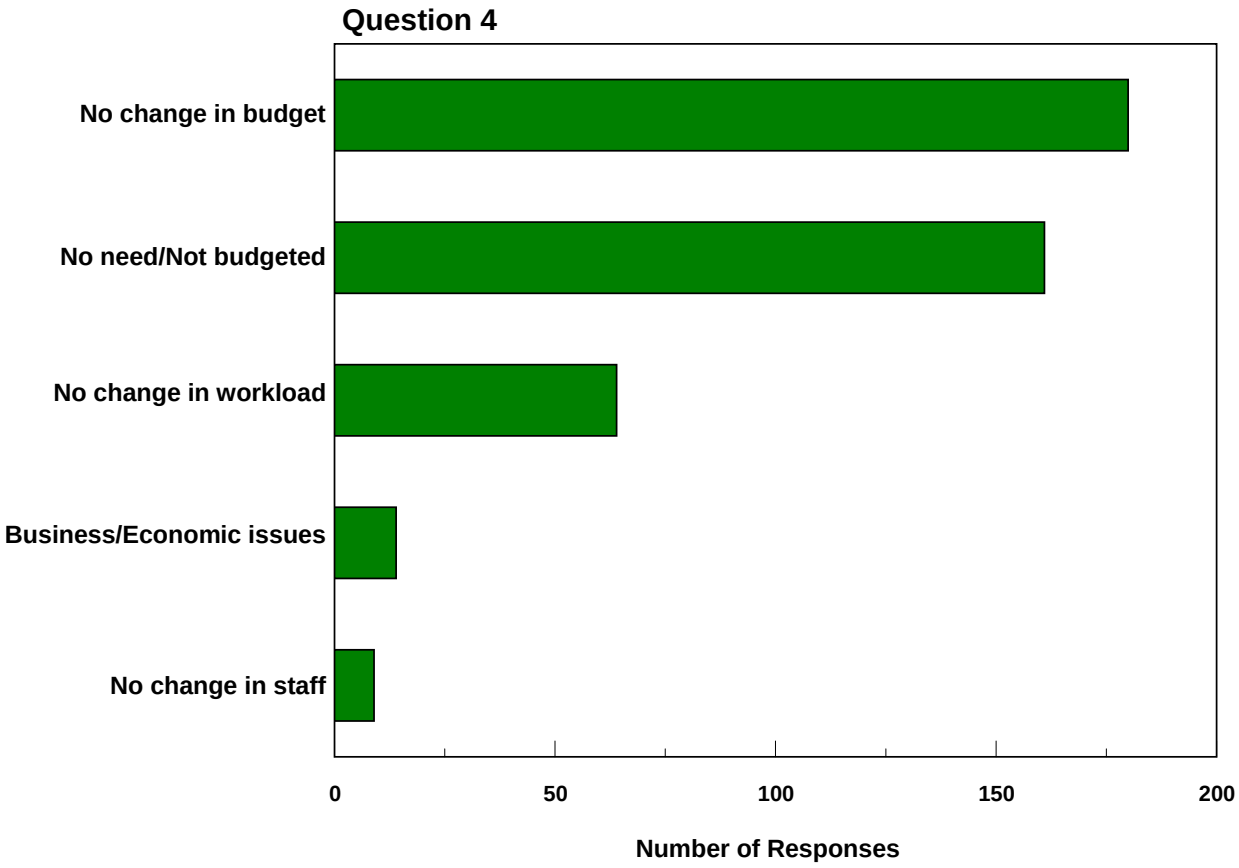
Reasons for Decrease in Spending for Laboratory Products

Laboratory Equipment <$2,500



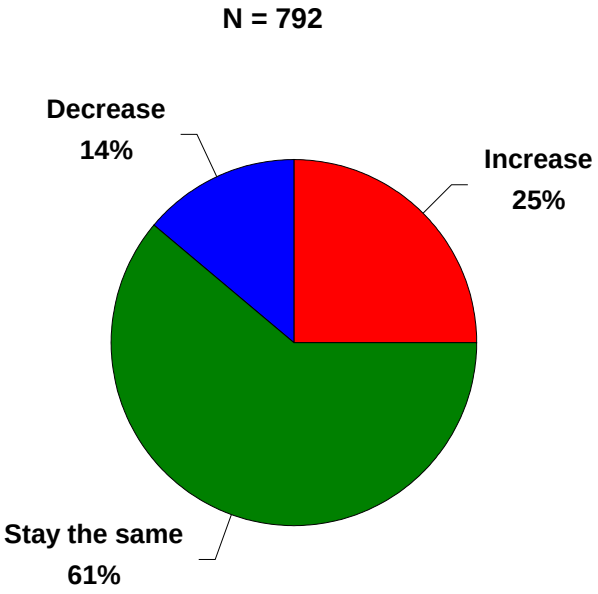
Reasons for No Change in Spending for Laboratory Products

Laboratory Equipment <$2,500



Spending for Laboratory Products for Fiscal 2014 When Compared to 2013

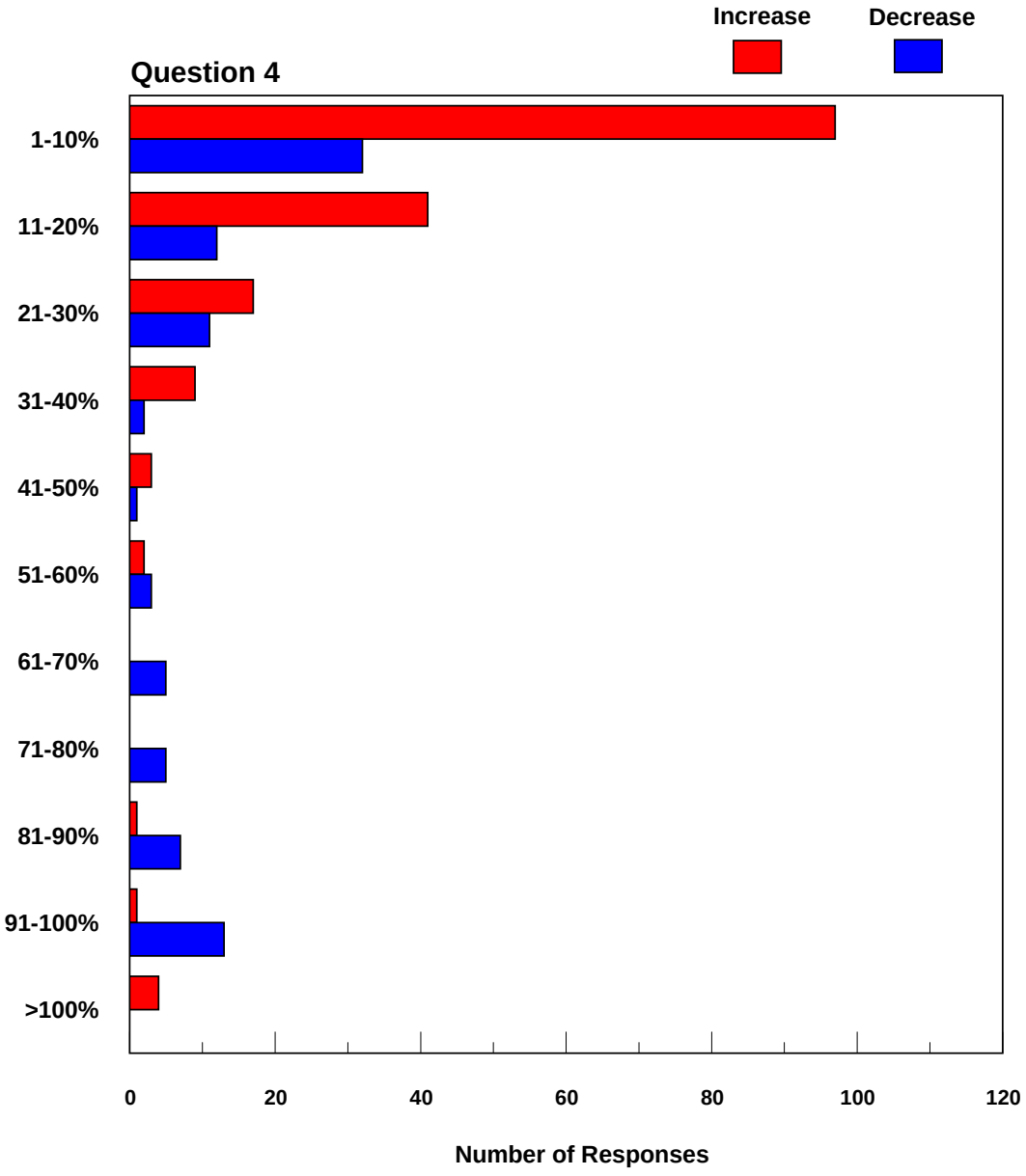
Laboratory Equipment >$2,500



Question 4

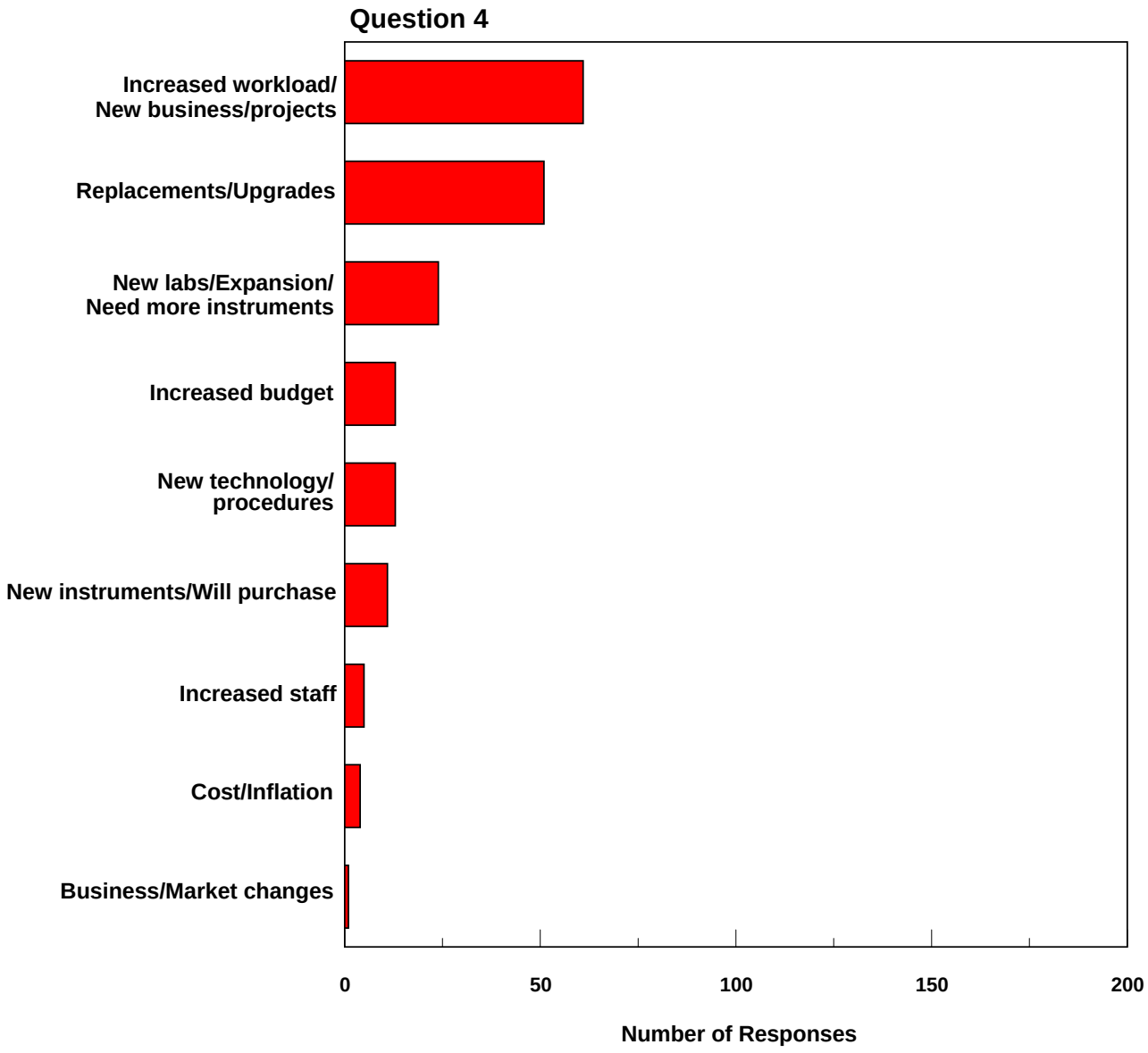
Percentage of Increase or Decrease in Spending for Laboratory Products

Laboratory Equipment >$2,500



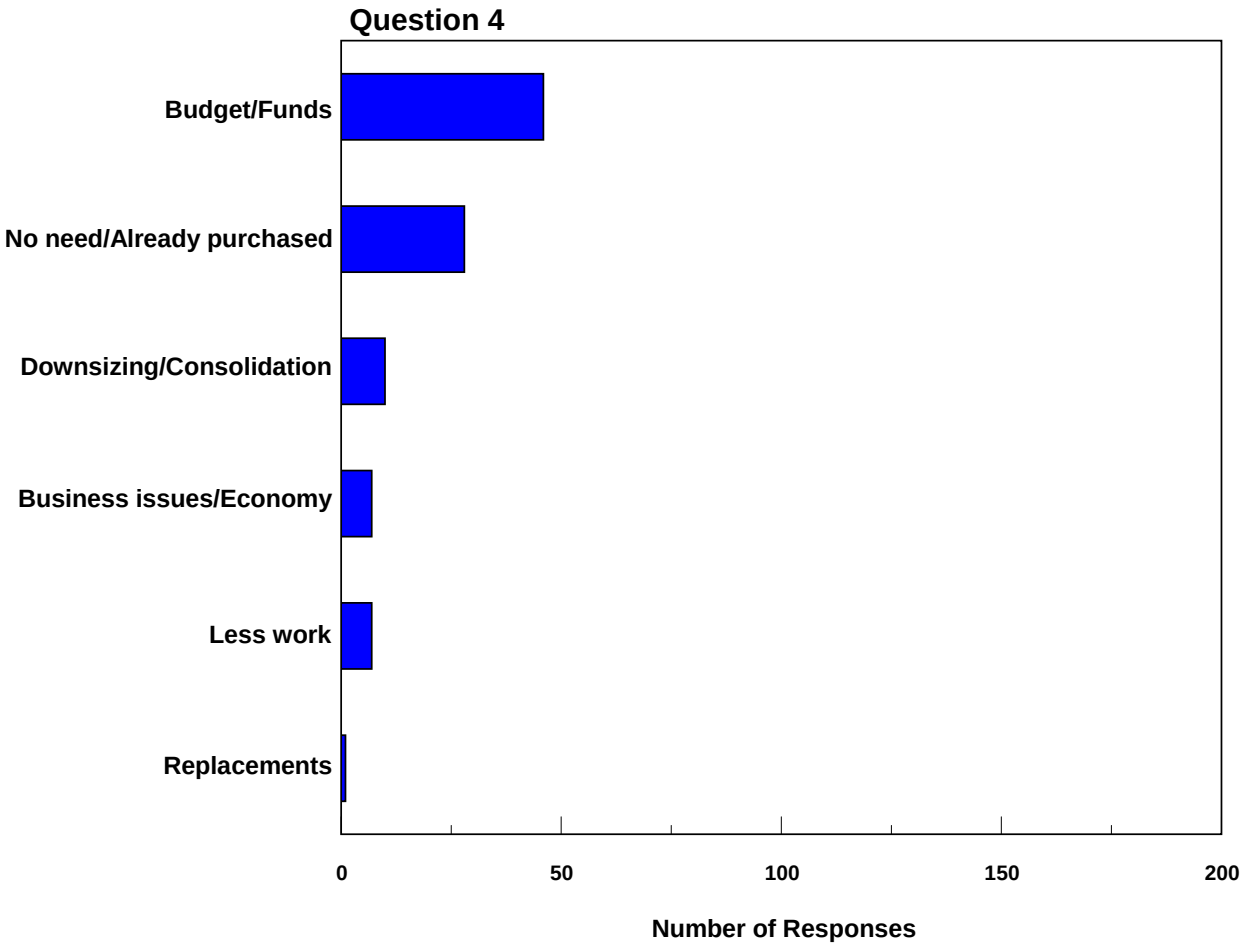
Reasons for Increase in Spending for Laboratory Products

Laboratory Equipment >$2,500



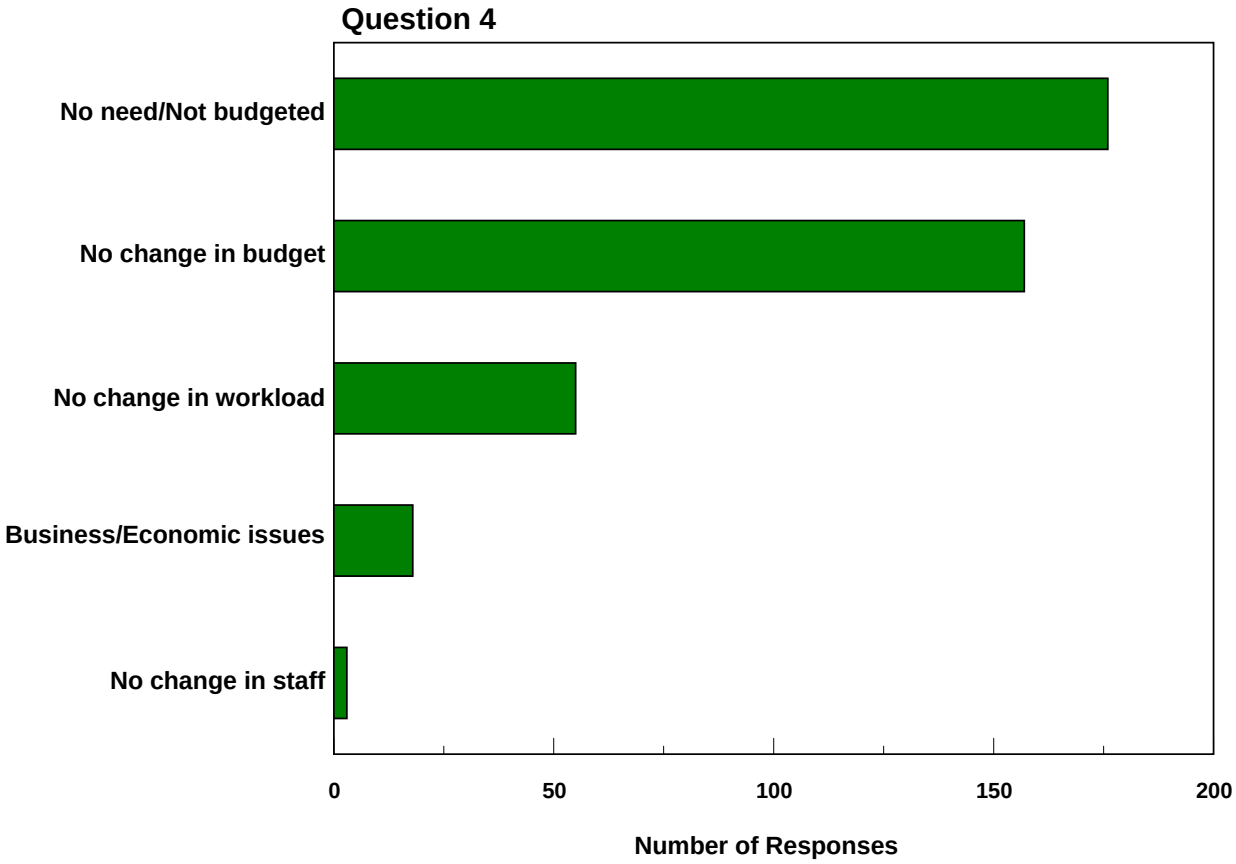
Reasons for Decrease in Spending for Laboratory Products

Laboratory Equipment >$2,500



Reasons for No Change in Spending for Laboratory Products

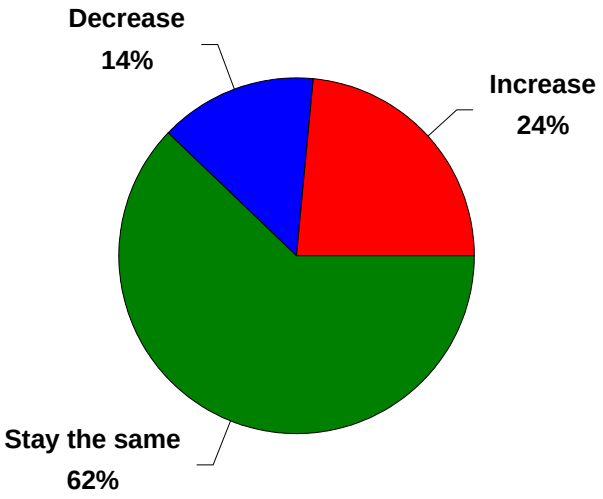
Laboratory Equipment >$2,500



Spending for Laboratory Products for Fiscal 2014 When Compared to 2013

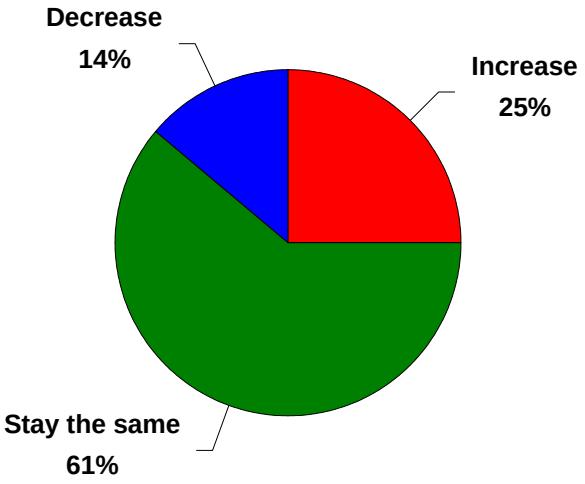
Laboratory Equipment <$2,500

N = 800



Laboratory Equipment >$2,500

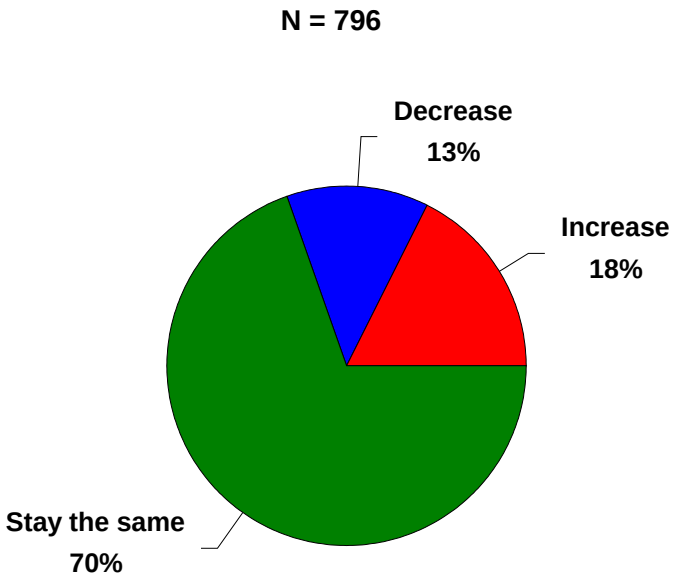
N = 792



Question 4

Spending for Laboratory Products for Fiscal 2014 When Compared to 2013

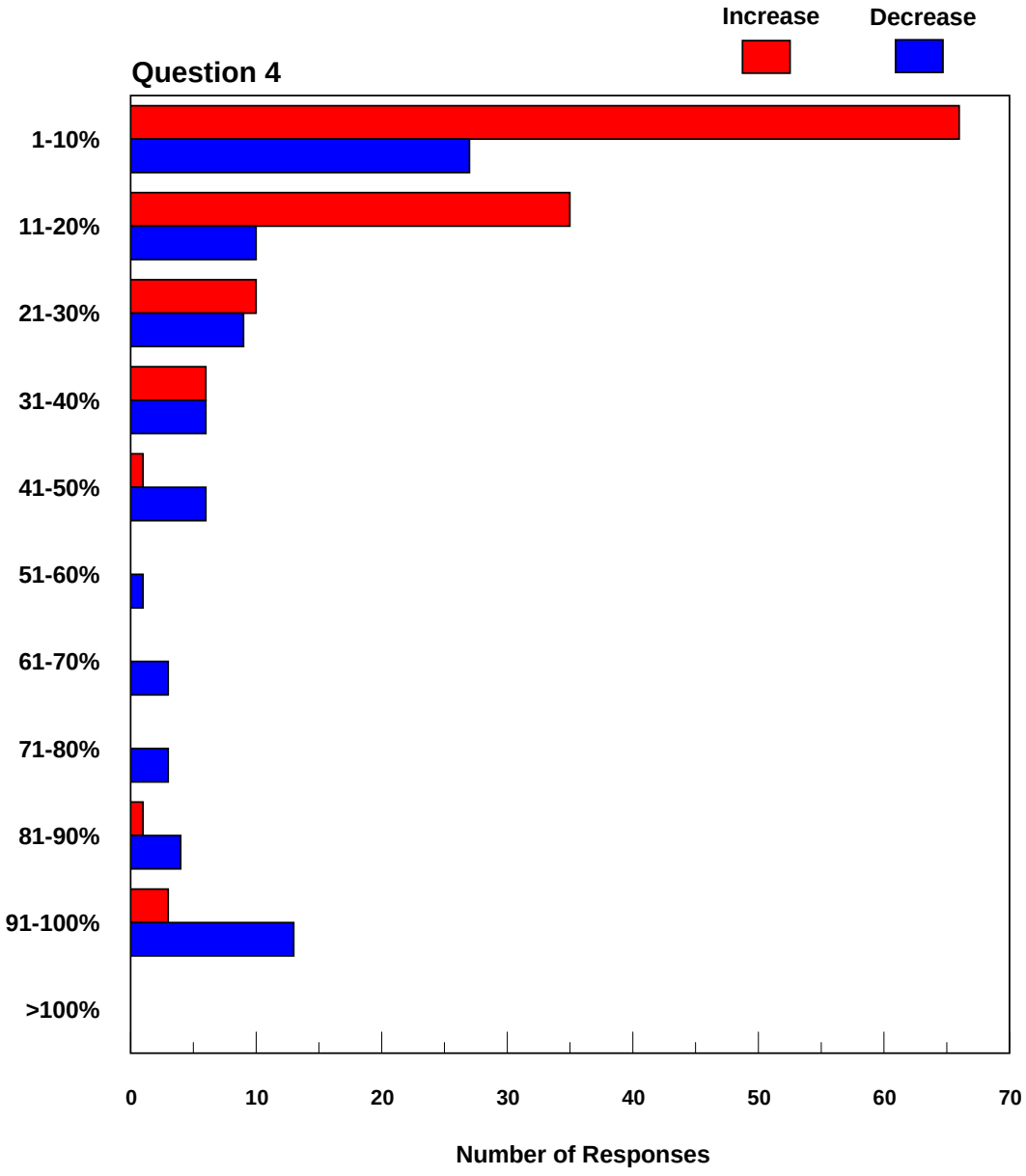
Laboratory Instruments <$5,000



Question 4

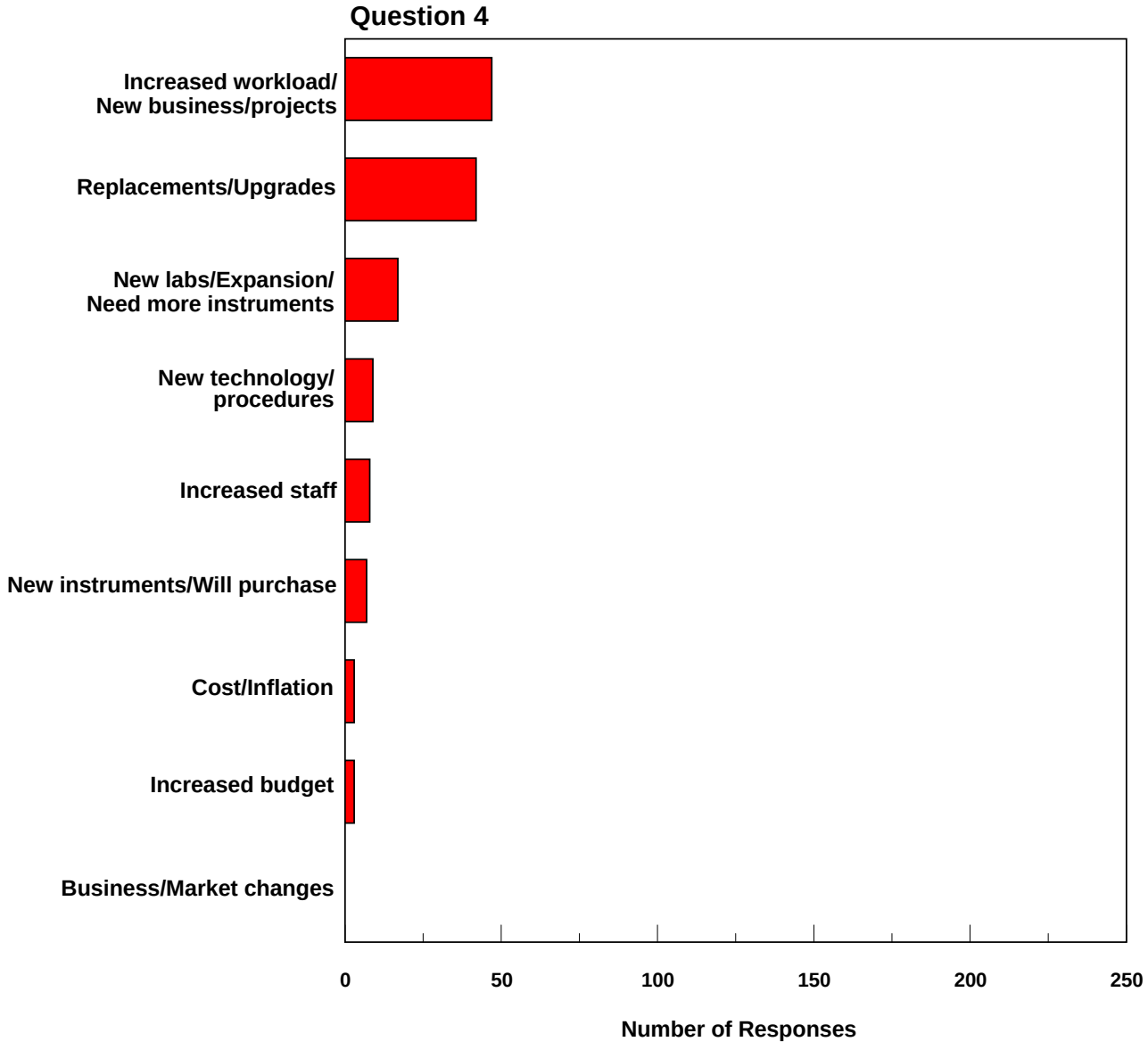
Percentage of Increase or Decrease in Spending for Laboratory Products

Laboratory Instruments <$5,000



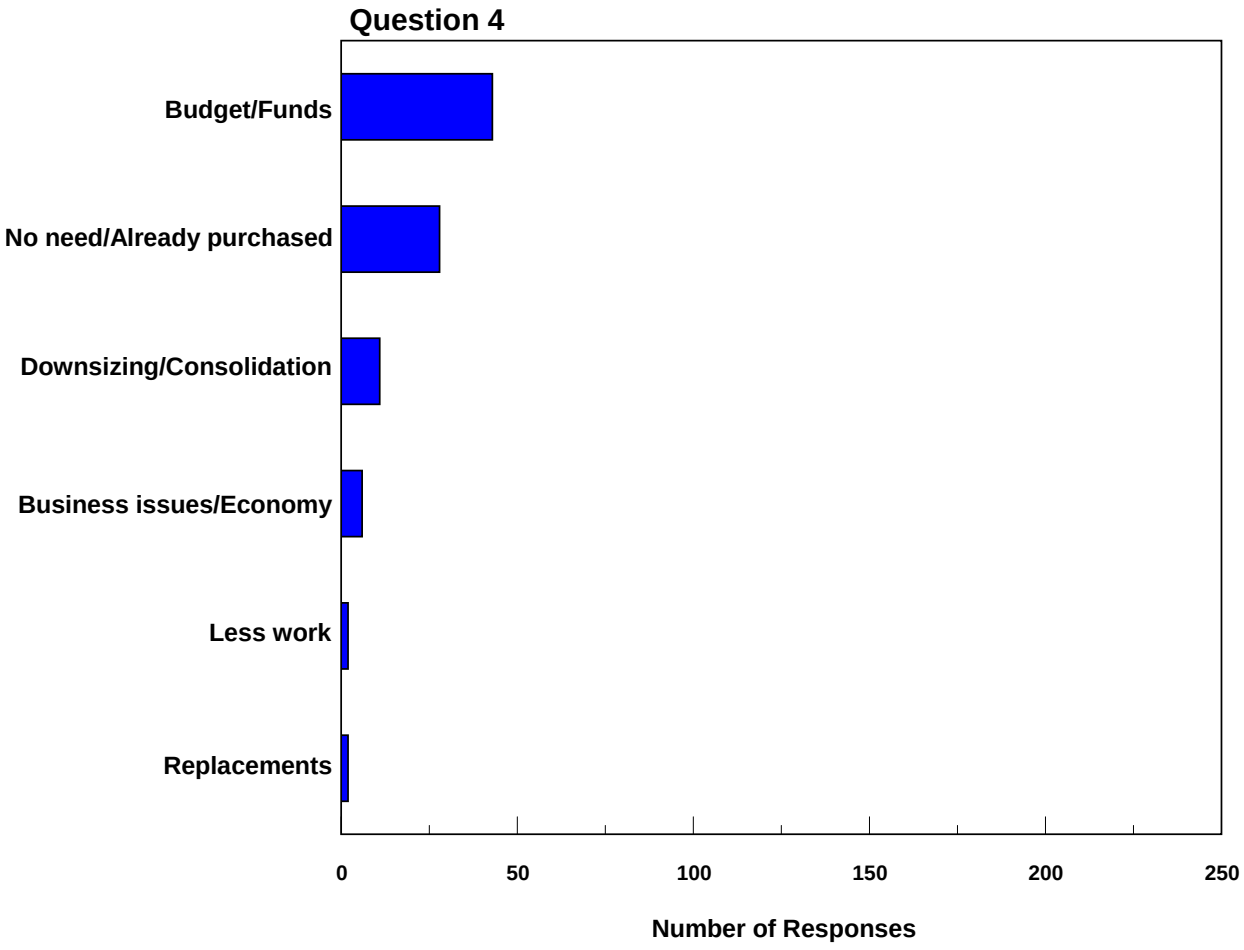
Reasons for Increase in Spending for Laboratory Products

Laboratory Instruments <$5,000



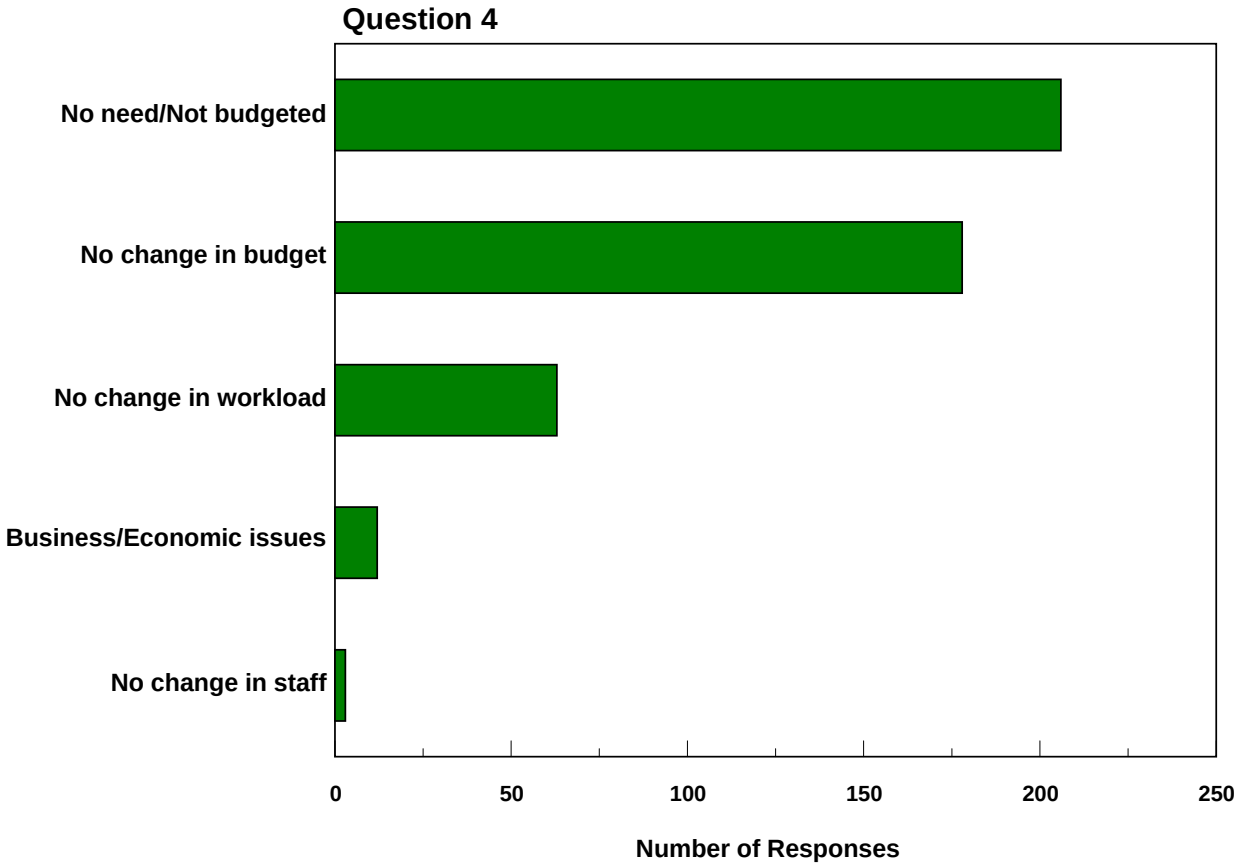
Reasons for Decrease in Spending for Laboratory Products

Laboratory Instruments <$5,000



Reasons for No Change in Spending for Laboratory Products

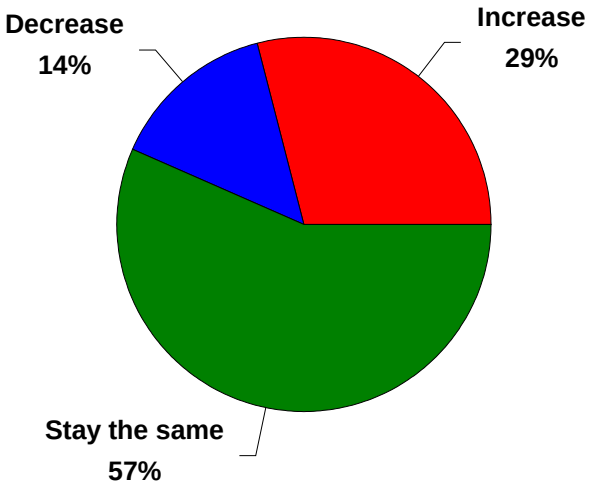
Laboratory Instruments <$5,000



Spending for Laboratory Products for Fiscal 2014 When Compared to 2013

Laboratory Instruments >$5,000

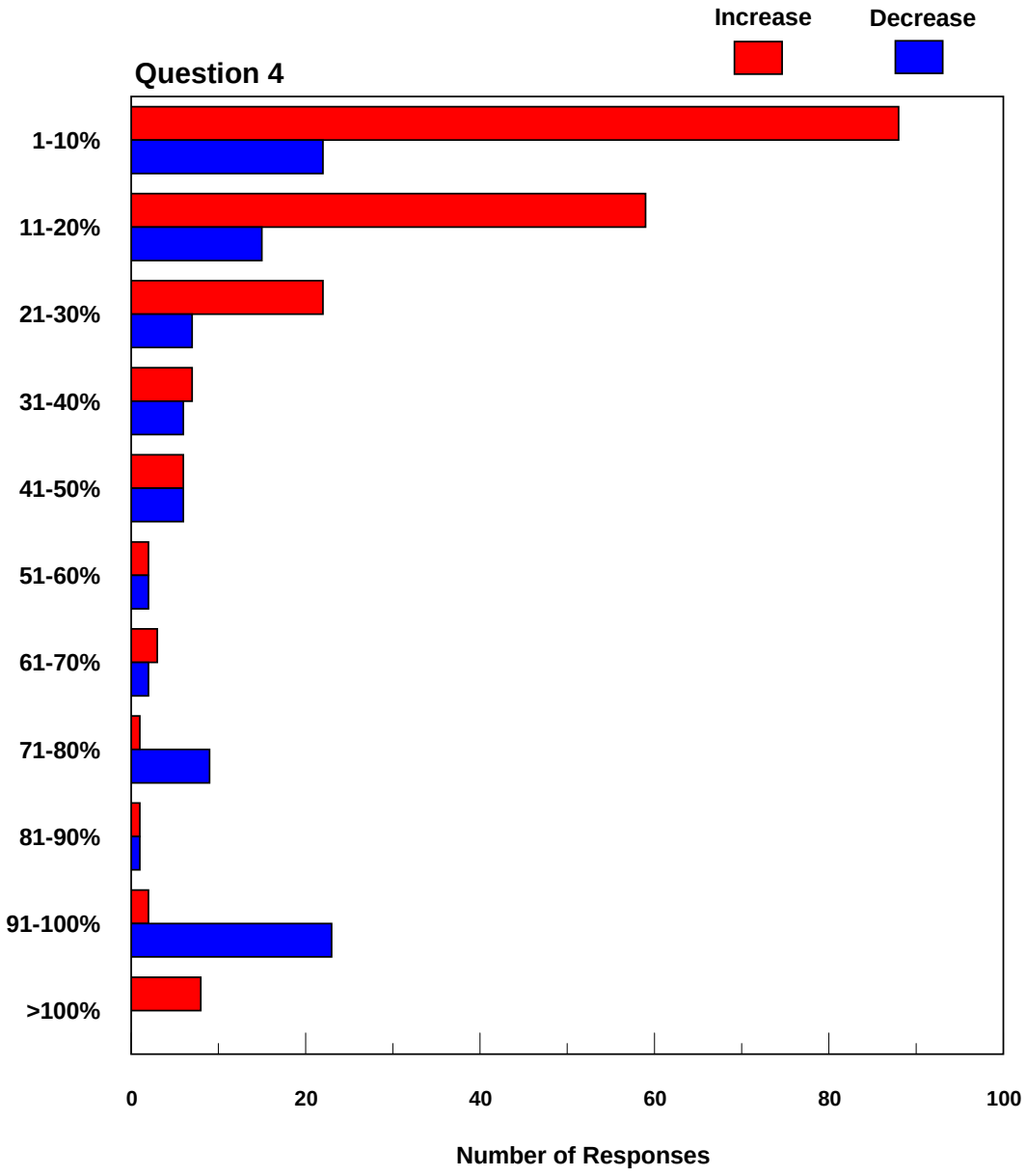
N = 792



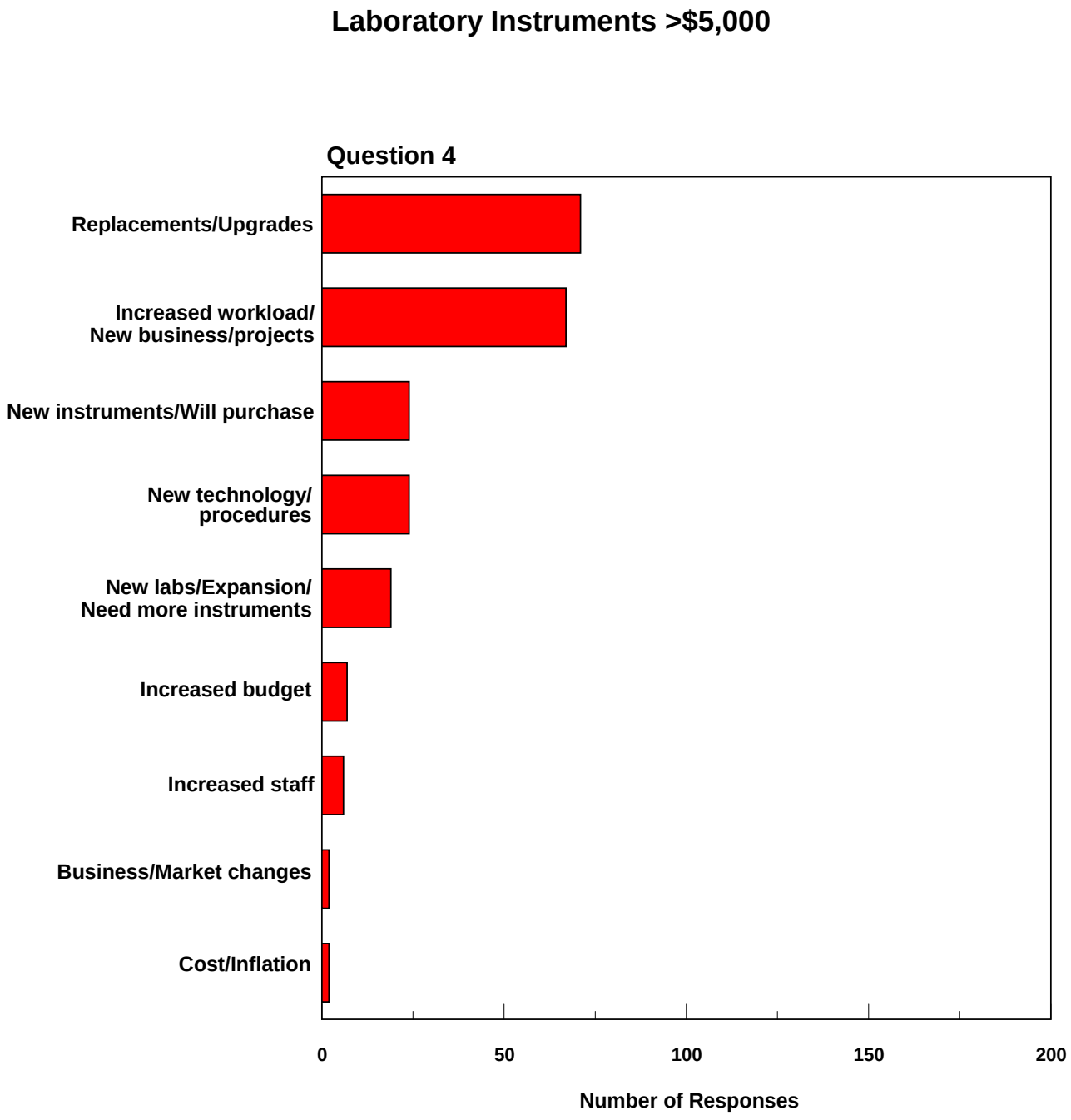
Question 4

Percentage of Increase or Decrease in Spending for Laboratory Products

Laboratory Instruments >$5,000

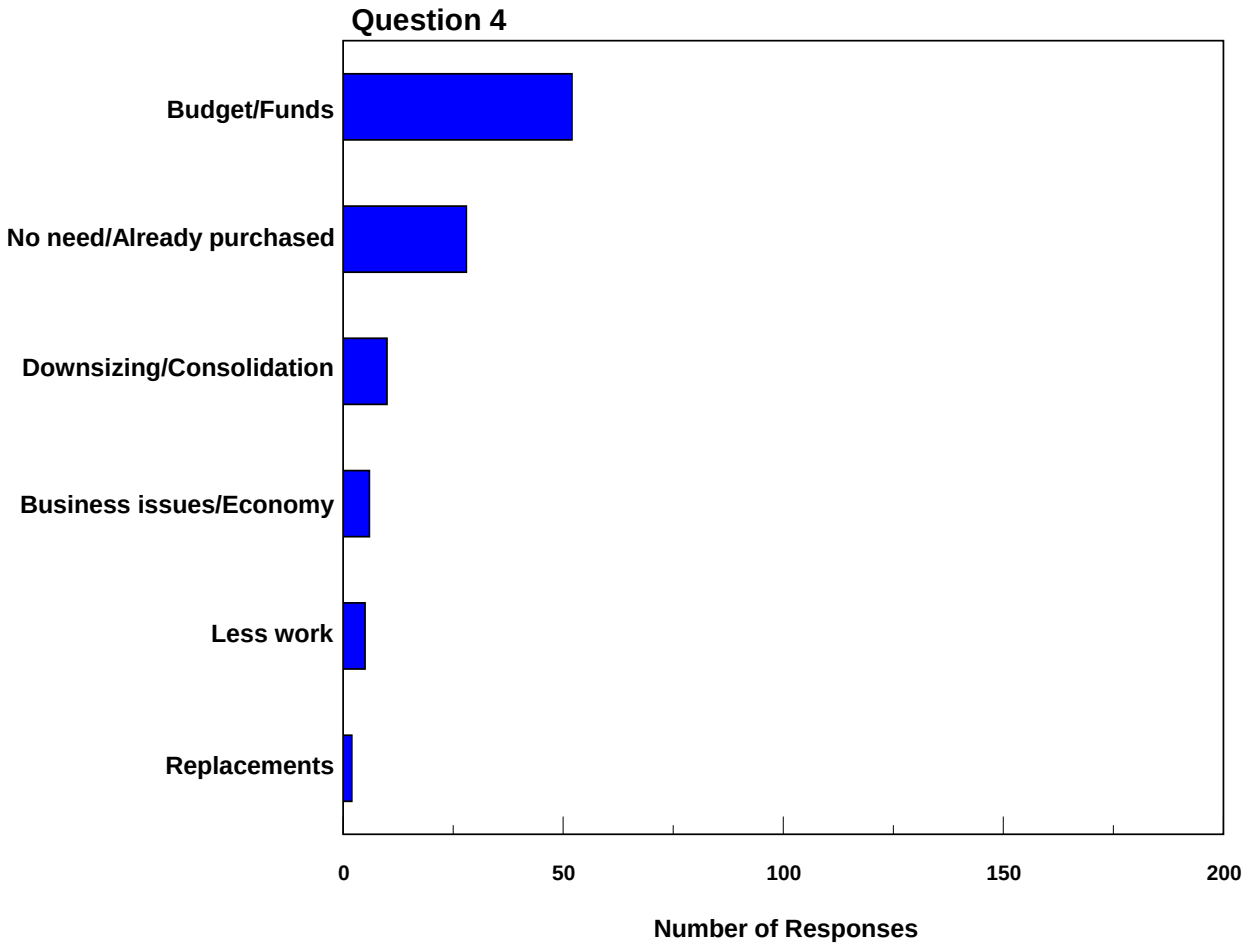


Reasons for Increase in Spending for Laboratory Products

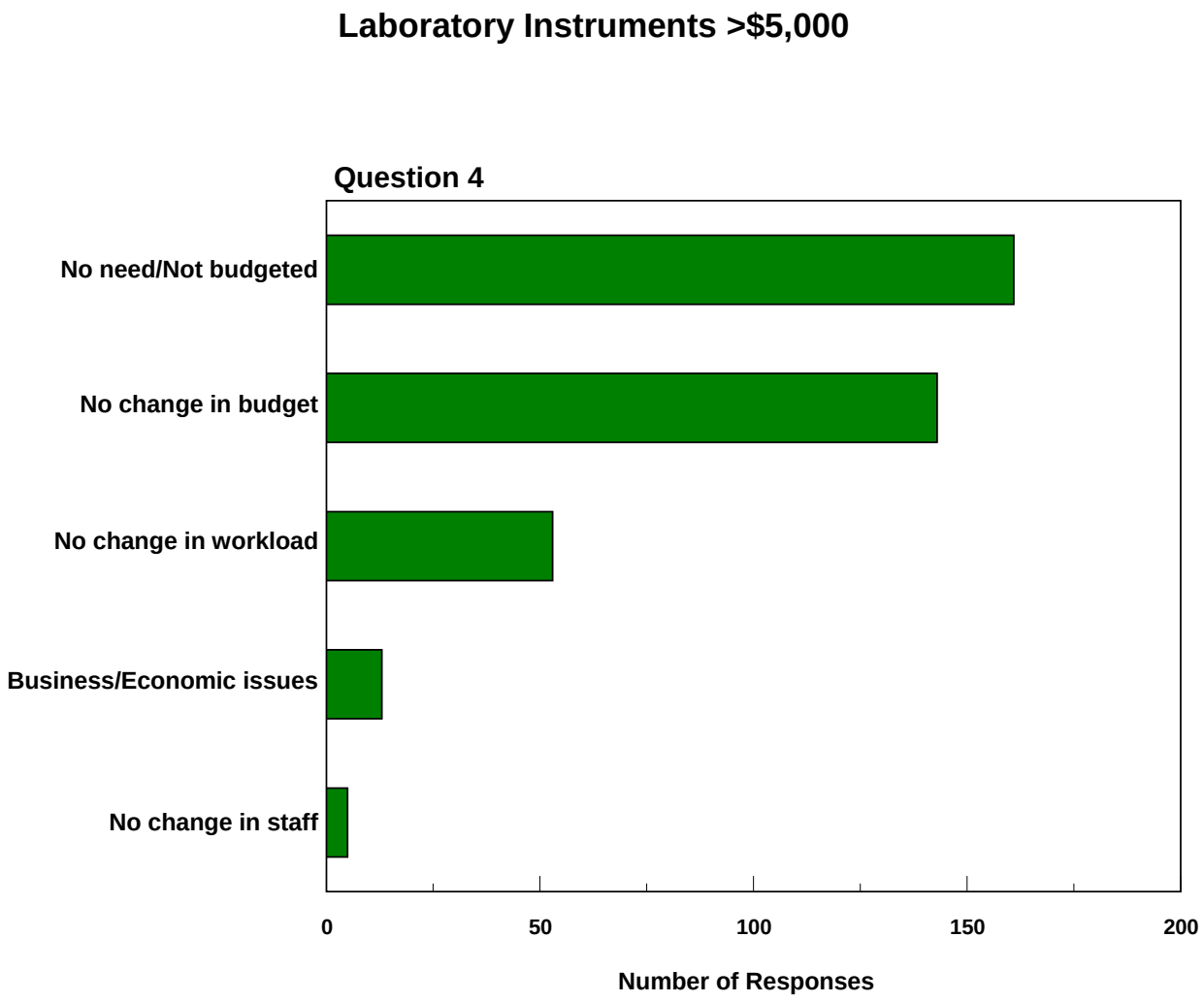


Reasons for Decrease in Spending for Laboratory Products

Laboratory Instruments >$5,000



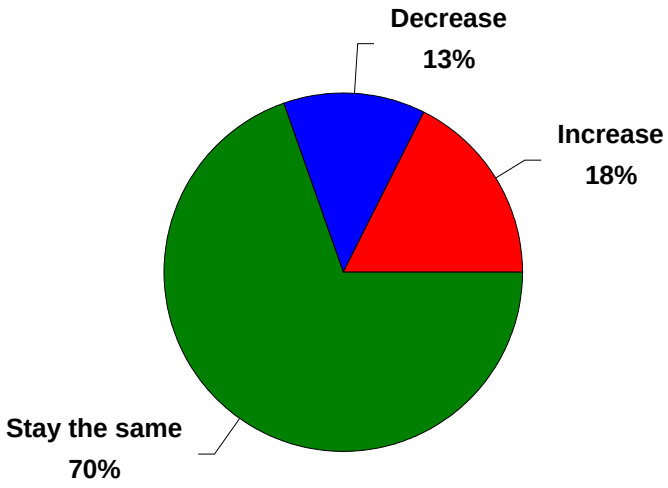
Reasons for No Change in Spending for Laboratory Products



Spending for Laboratory Products for Fiscal 2014 When Compared to 2013

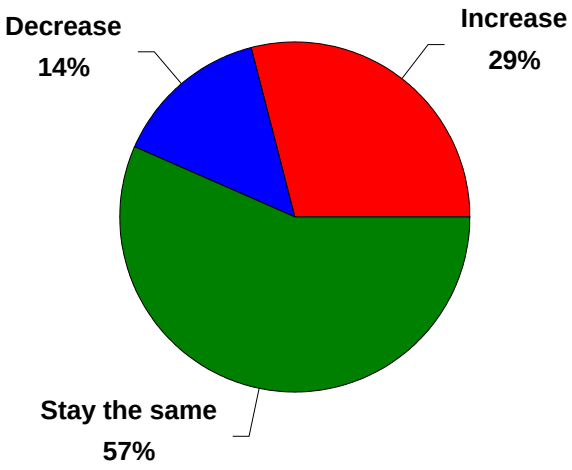
Laboratory Instruments <$5,000

N = 796



Laboratory Instruments >$5,000

N = 792

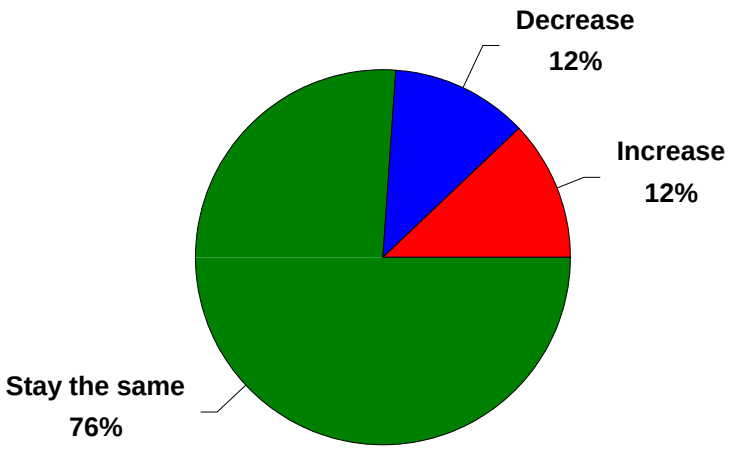


Question 4

Spending for Laboratory Products for Fiscal 2014 When Compared to 2013

Laboratory Furniture

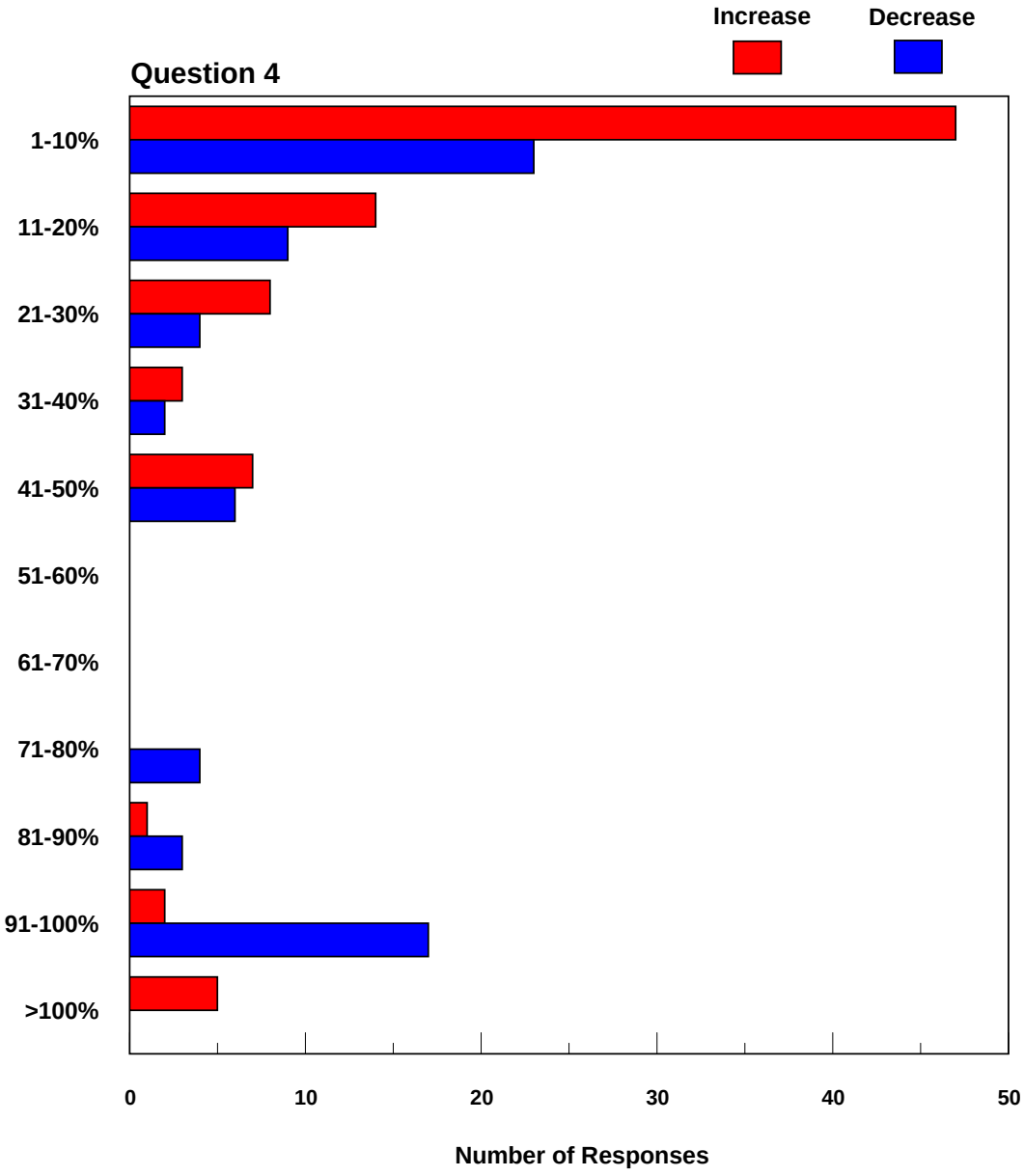
N = 795



Question 4

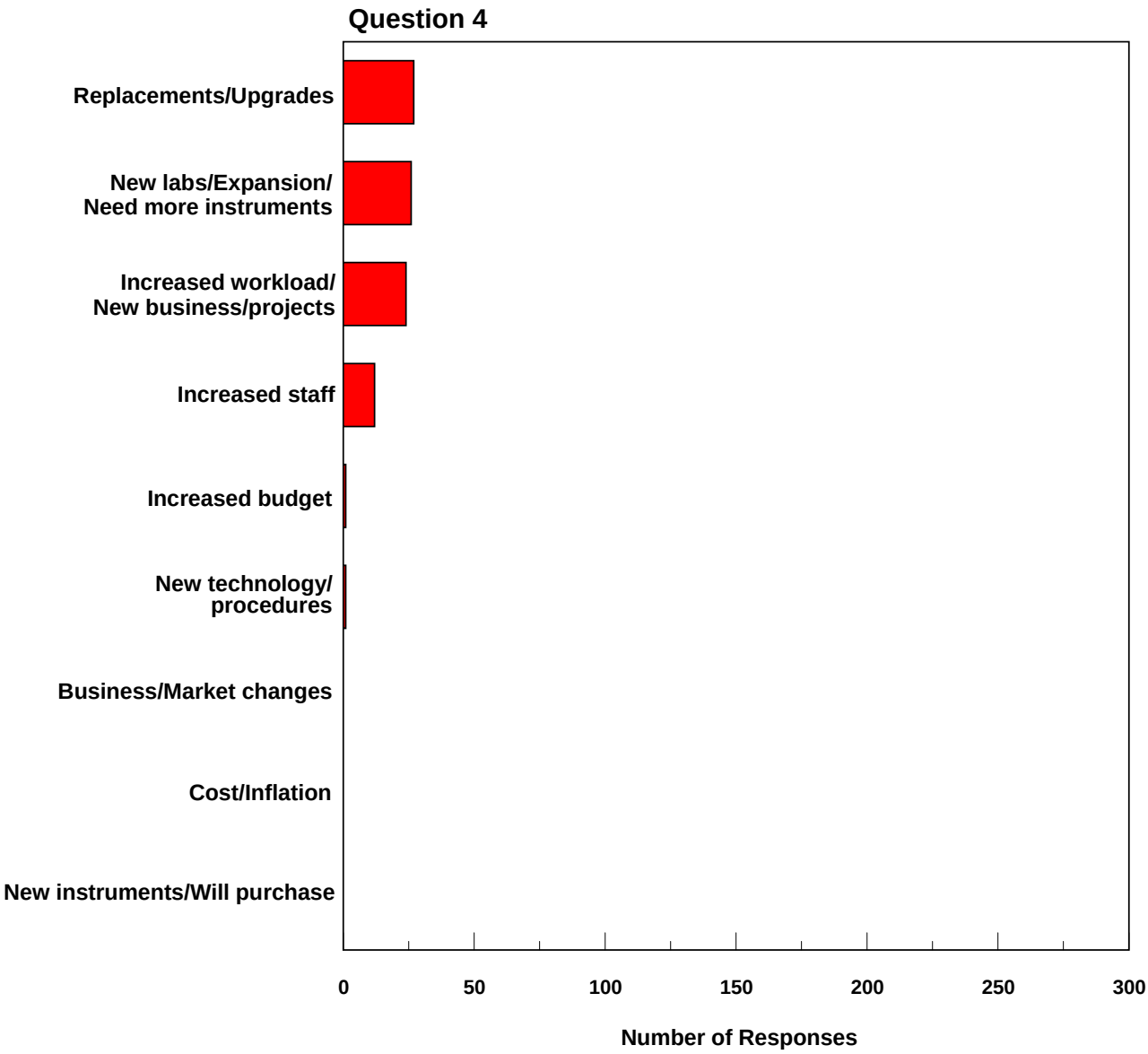
Percentage of Increase or Decrease in Spending for Laboratory Products

Laboratory Furniture



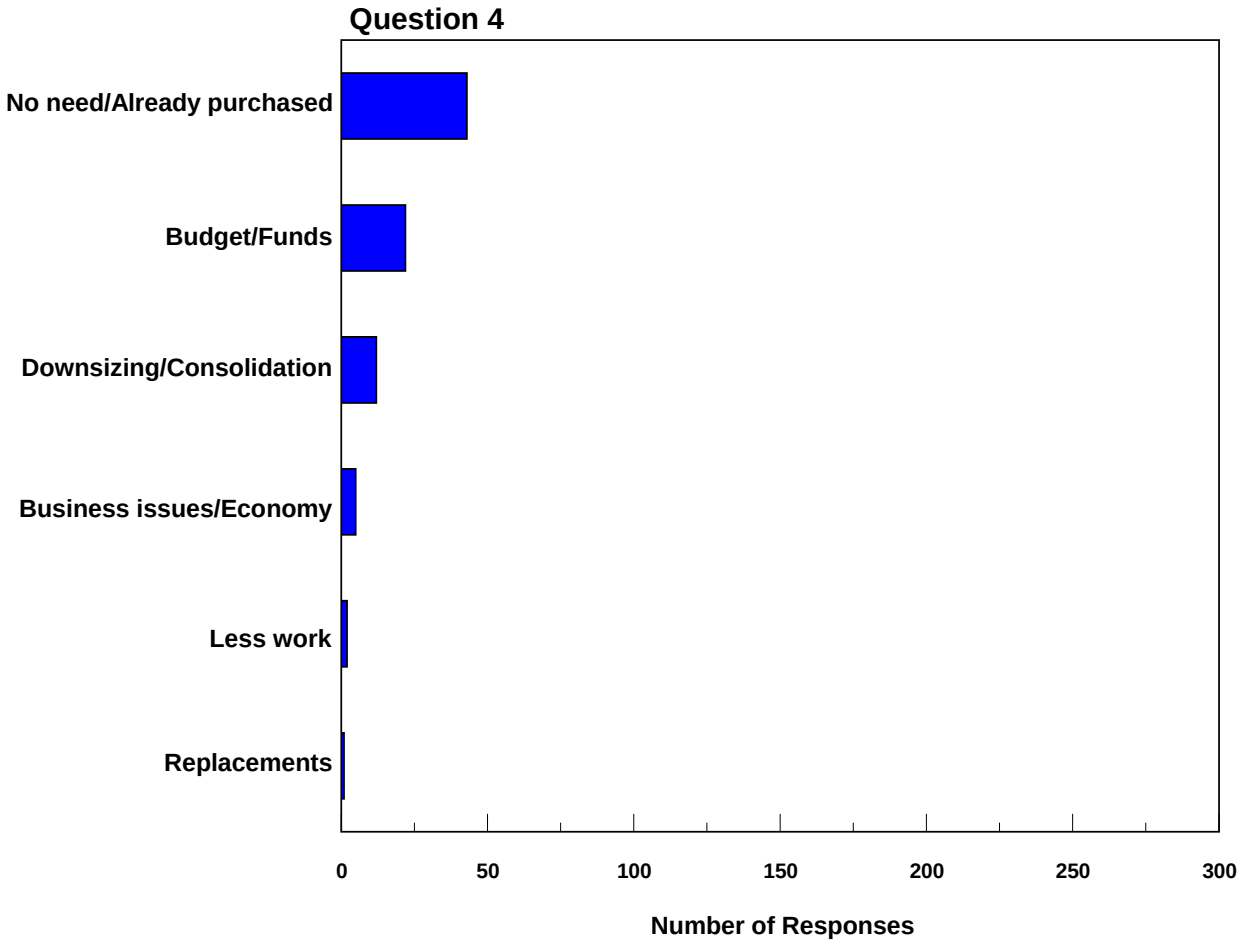
Reasons for Increase in Spending for Laboratory Products

Laboratory Furniture



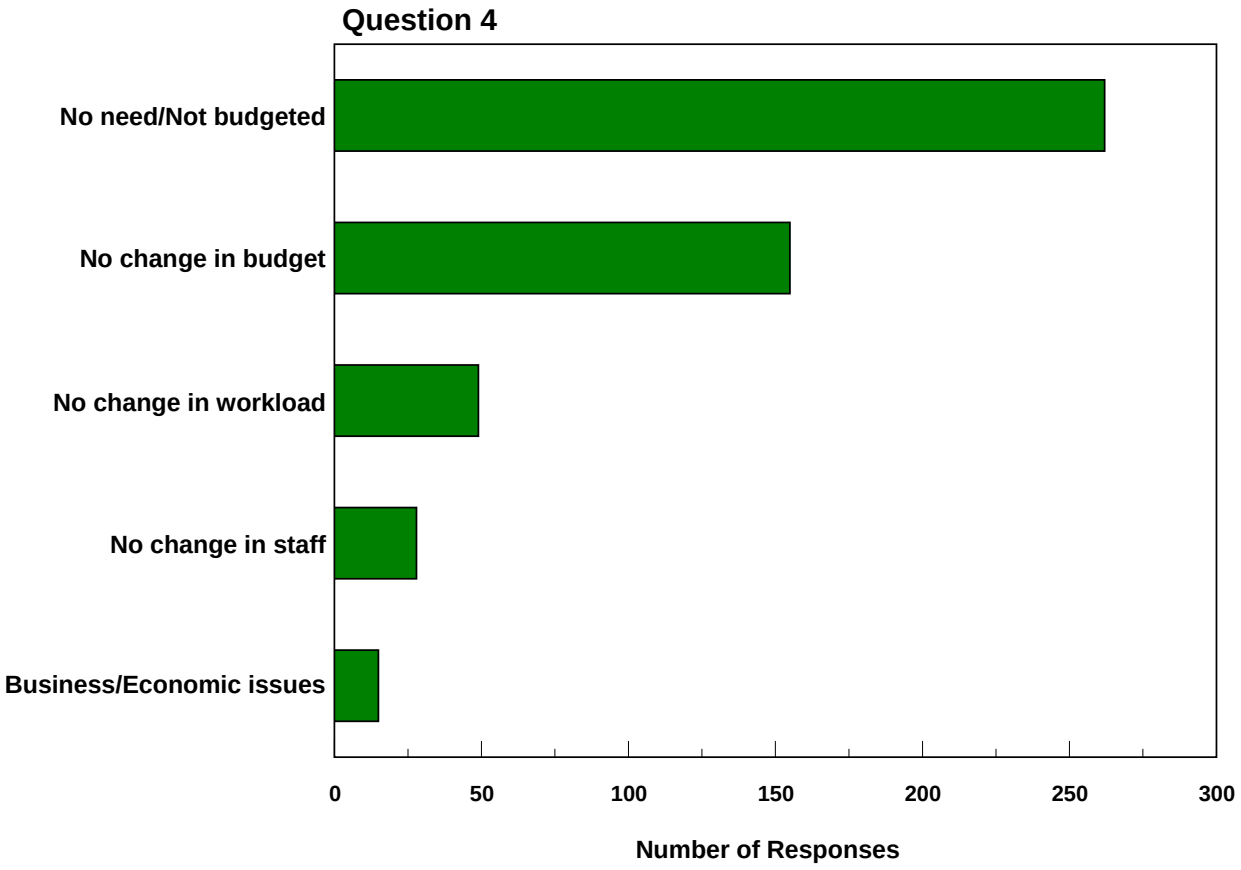
Reasons for Decrease in Spending for Laboratory Products

Laboratory Furniture



Reasons for No Change in Spending for Laboratory Products

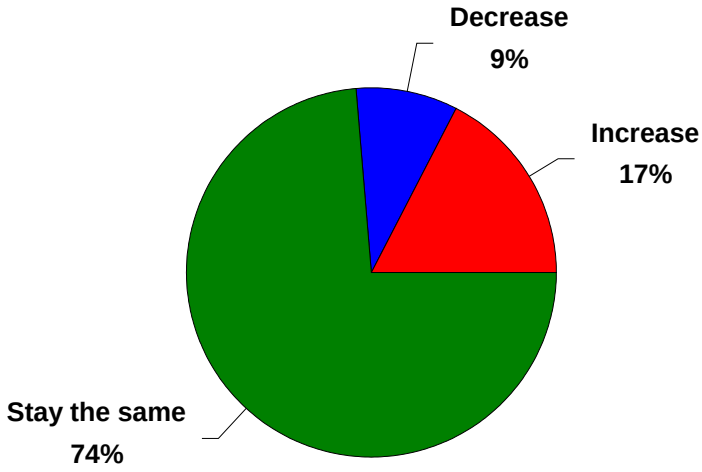
Laboratory Furniture



Spending for Laboratory Products for Fiscal 2014 When Compared to 2013

Laboratory Automation

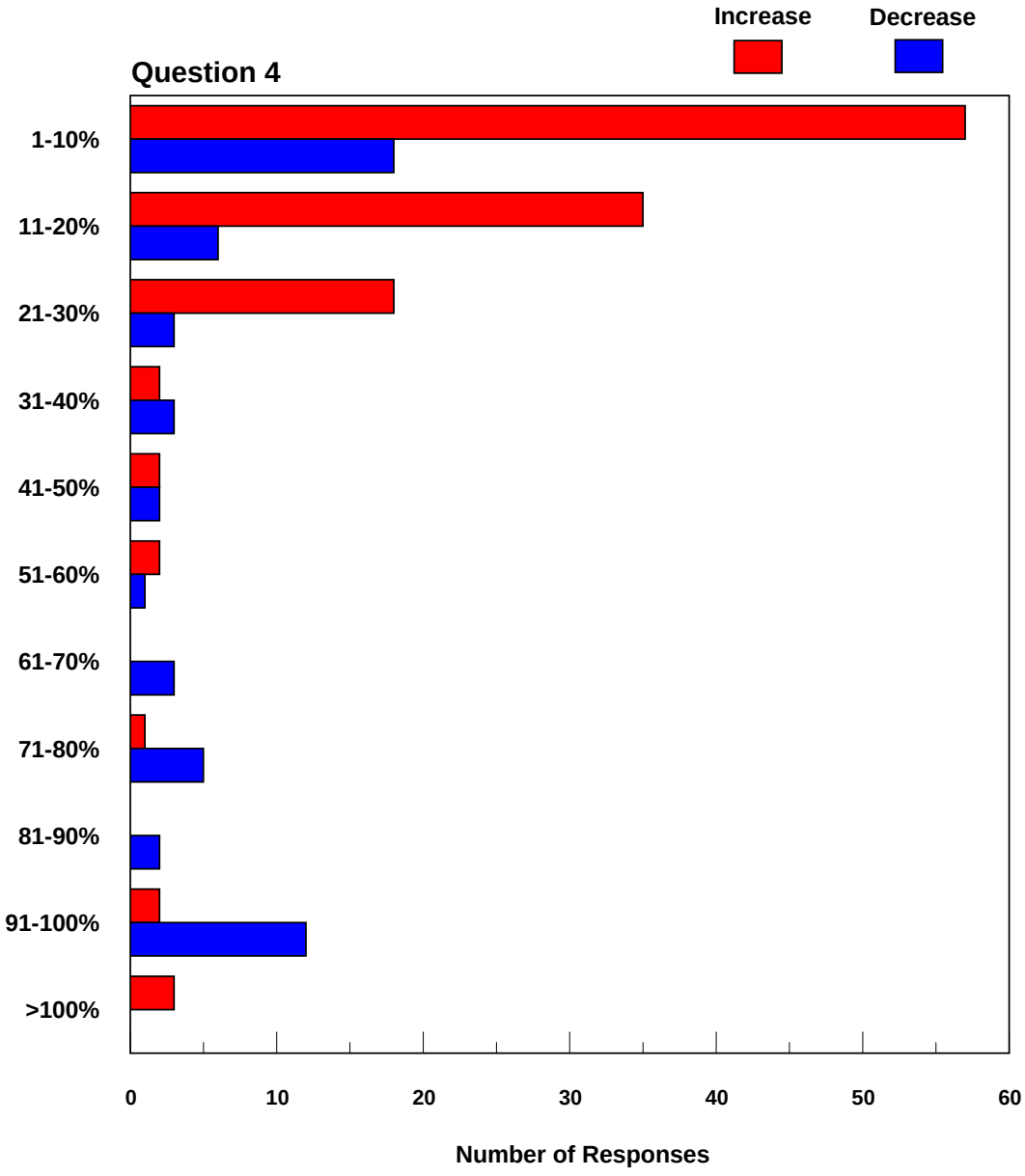
N = 797



Question 4

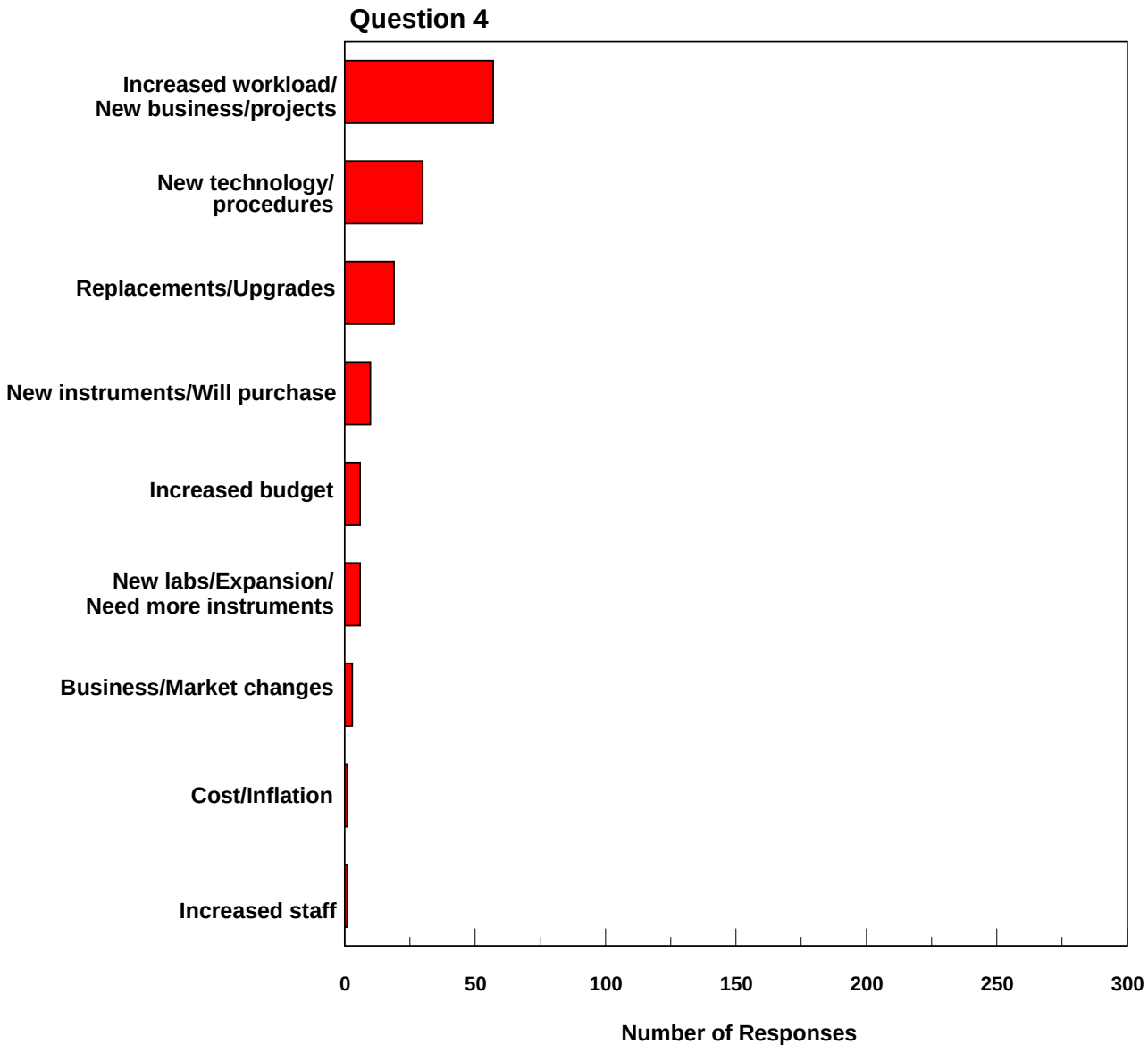
Percentage of Increase or Decrease in Spending for Laboratory Products

Laboratory Automation



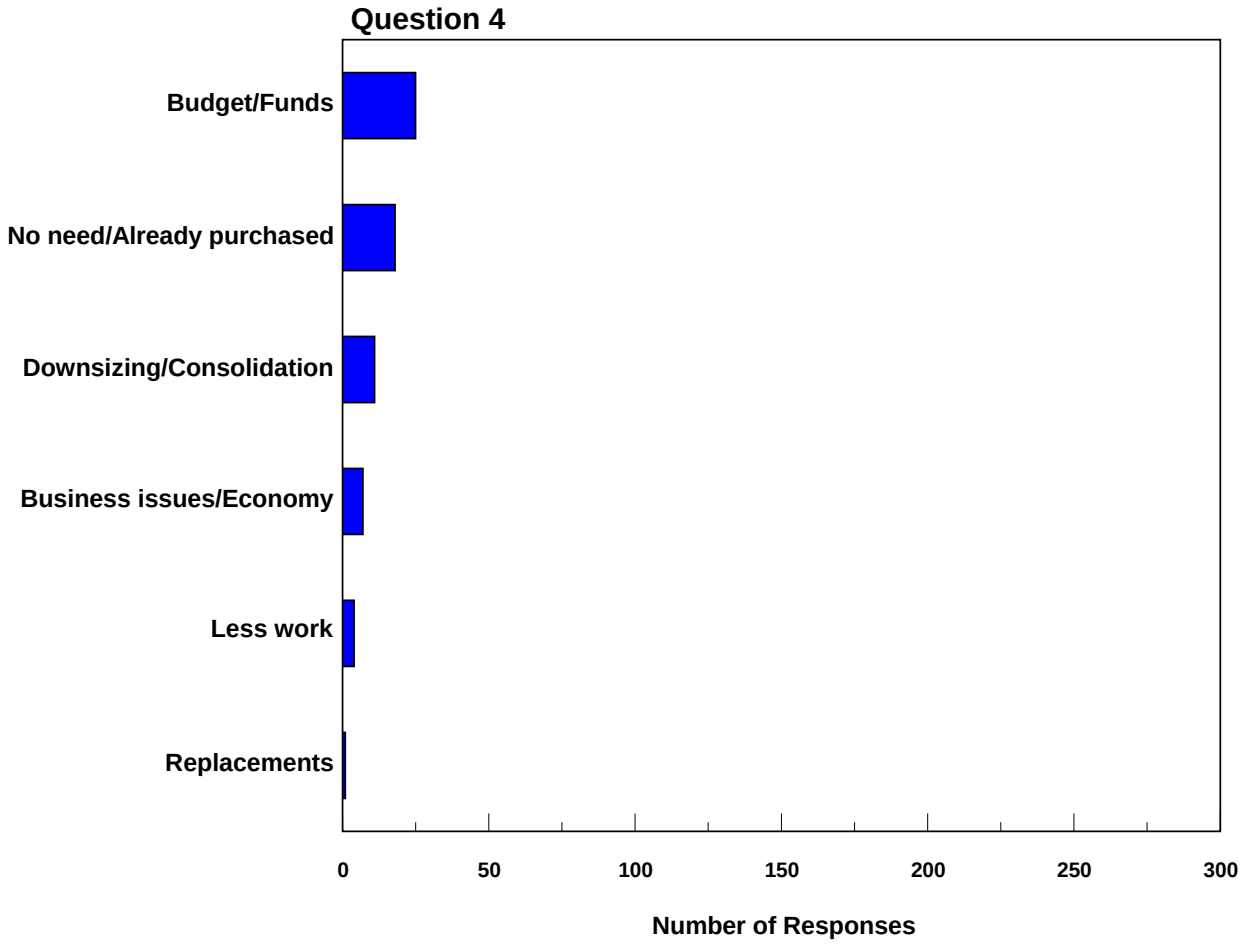
Reasons for Increase in Spending for Laboratory Products

Laboratory Automation



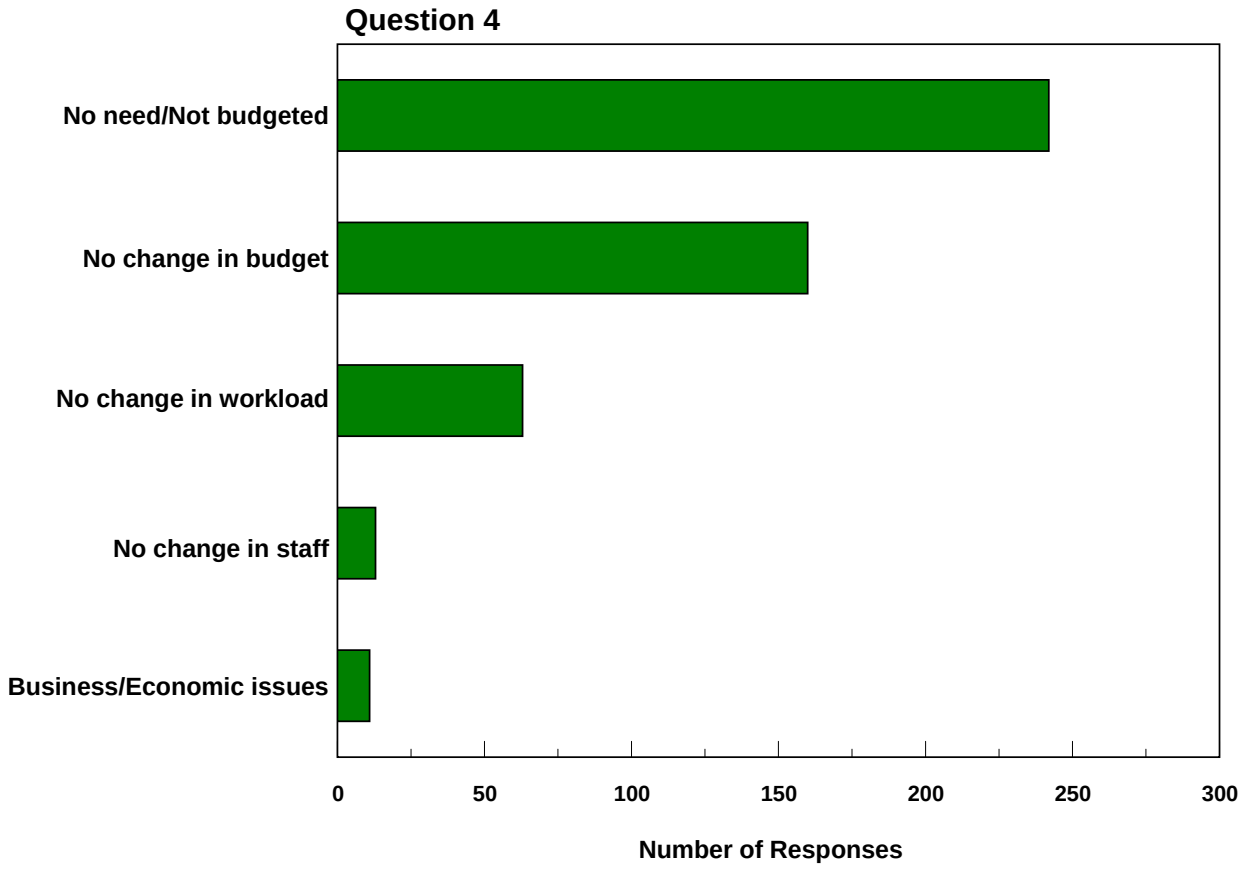
Reasons for Decrease in Spending for Laboratory Products

Laboratory Automation

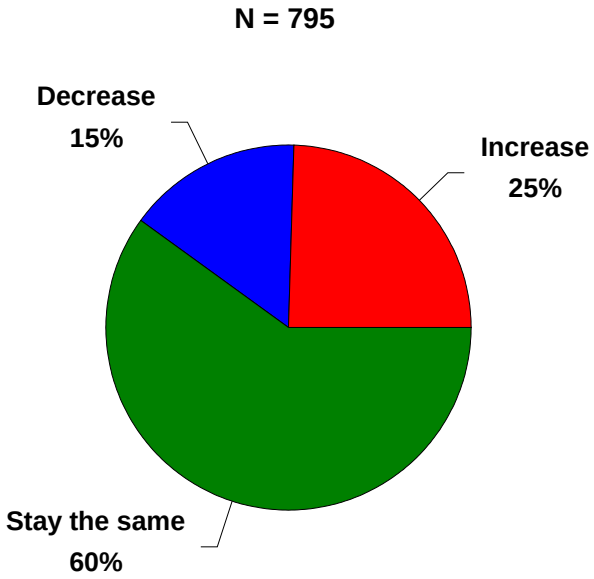


Reasons for No Change in Spending for Laboratory Products

Laboratory Automation

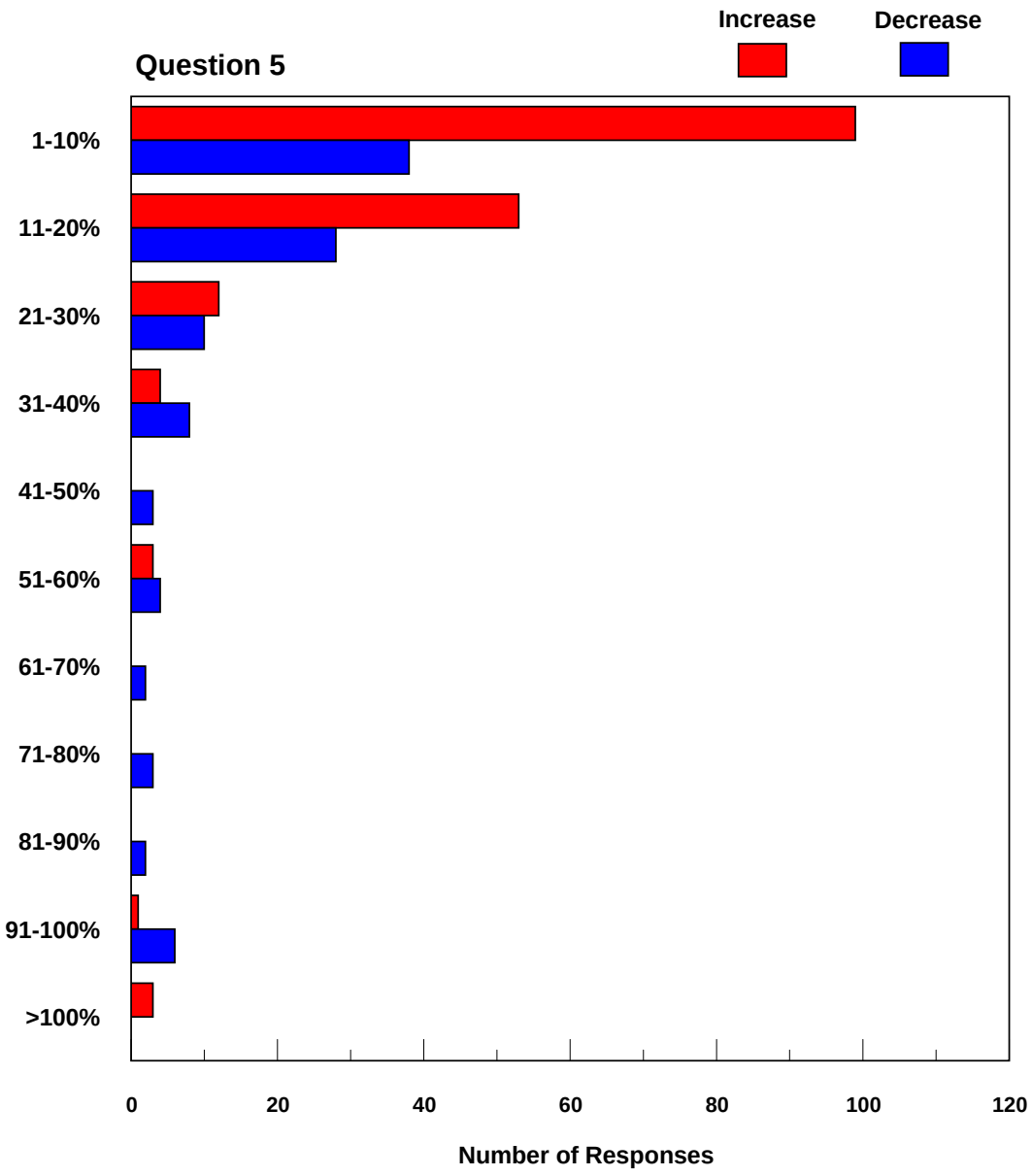


Operating Budget for Non-Capital Equipment for Fiscal 2014 when Compared to 2013

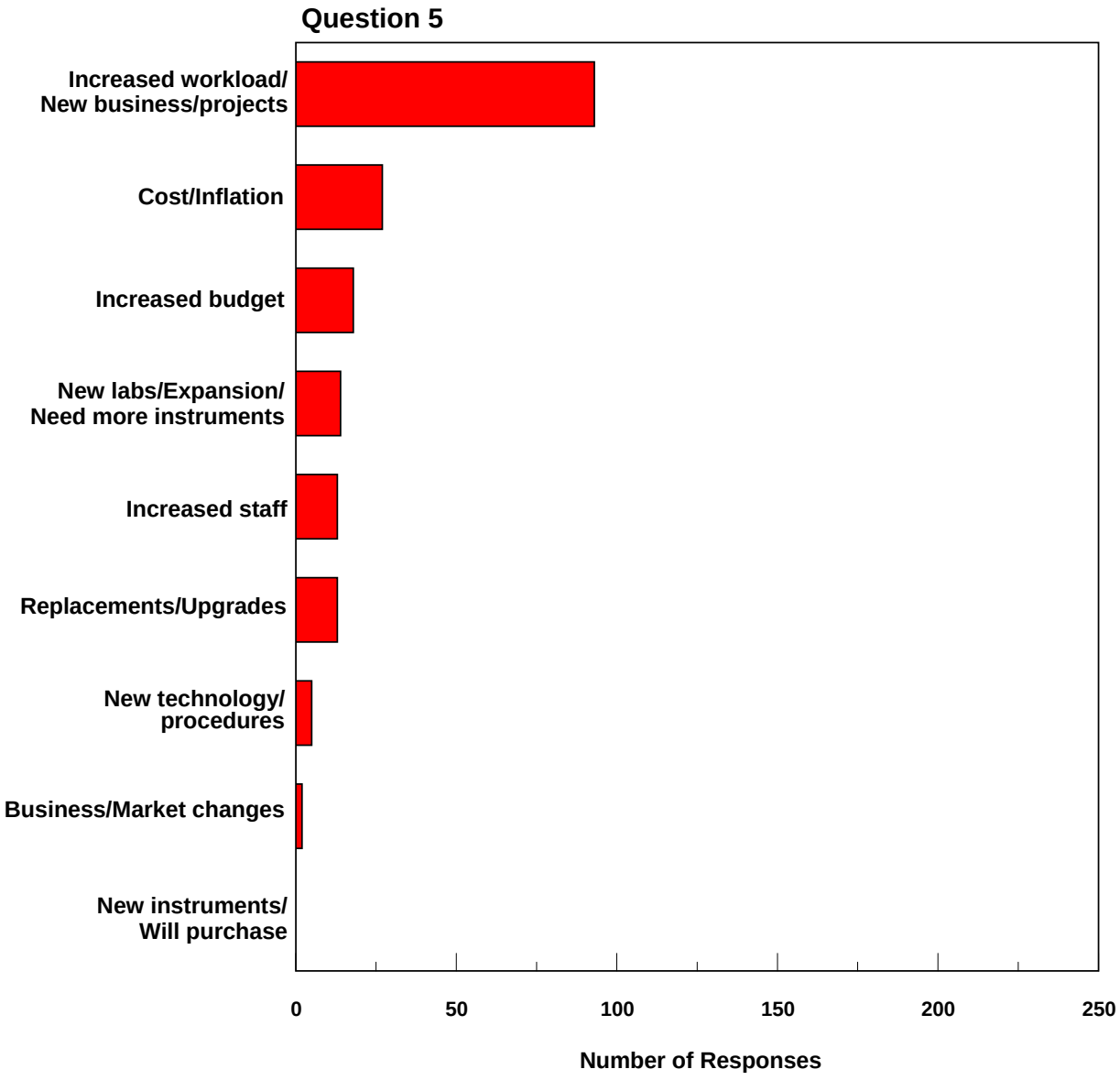


Question 5

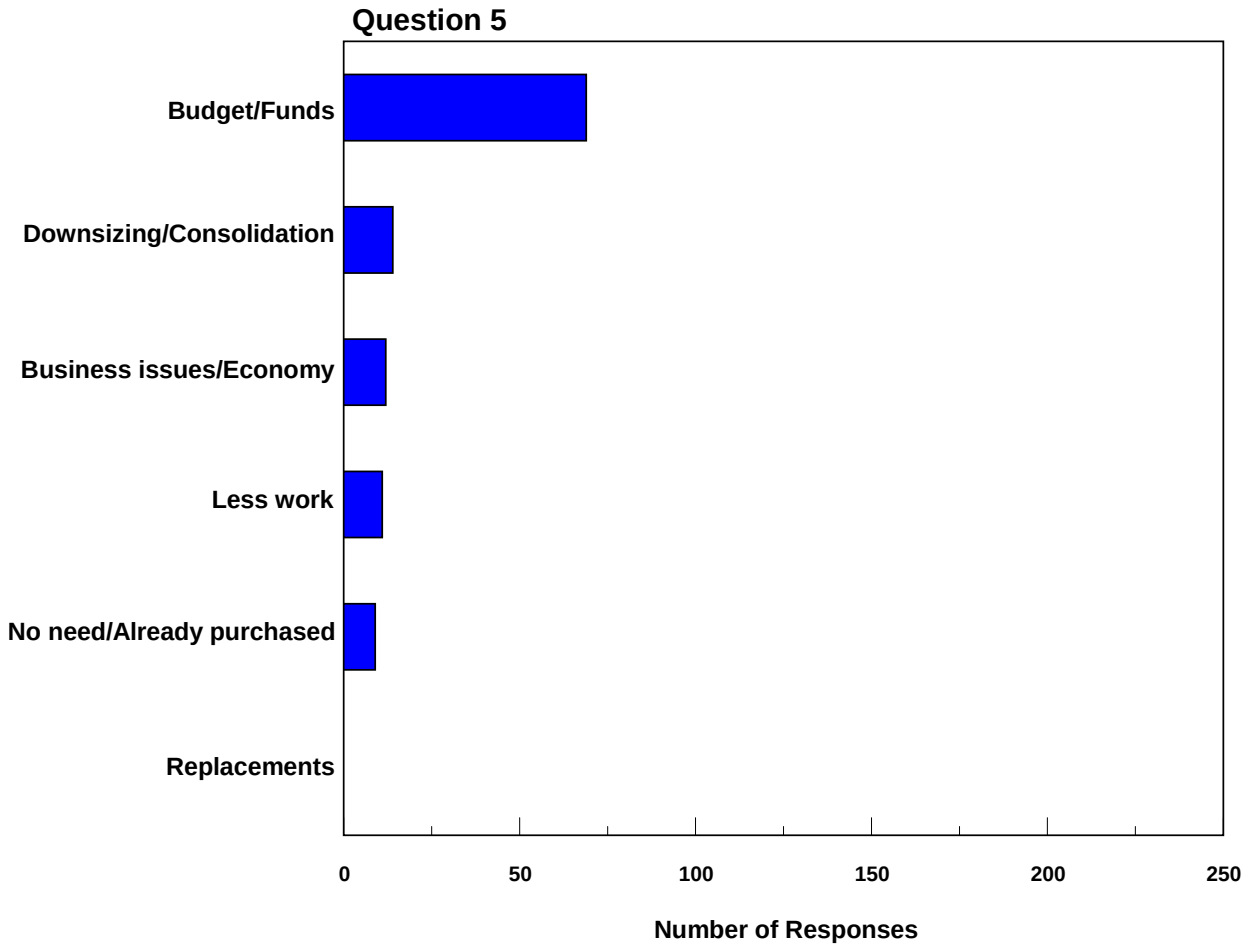
Percentage of Increase or Decrease in Operating Budget for Non-Capital Equipment



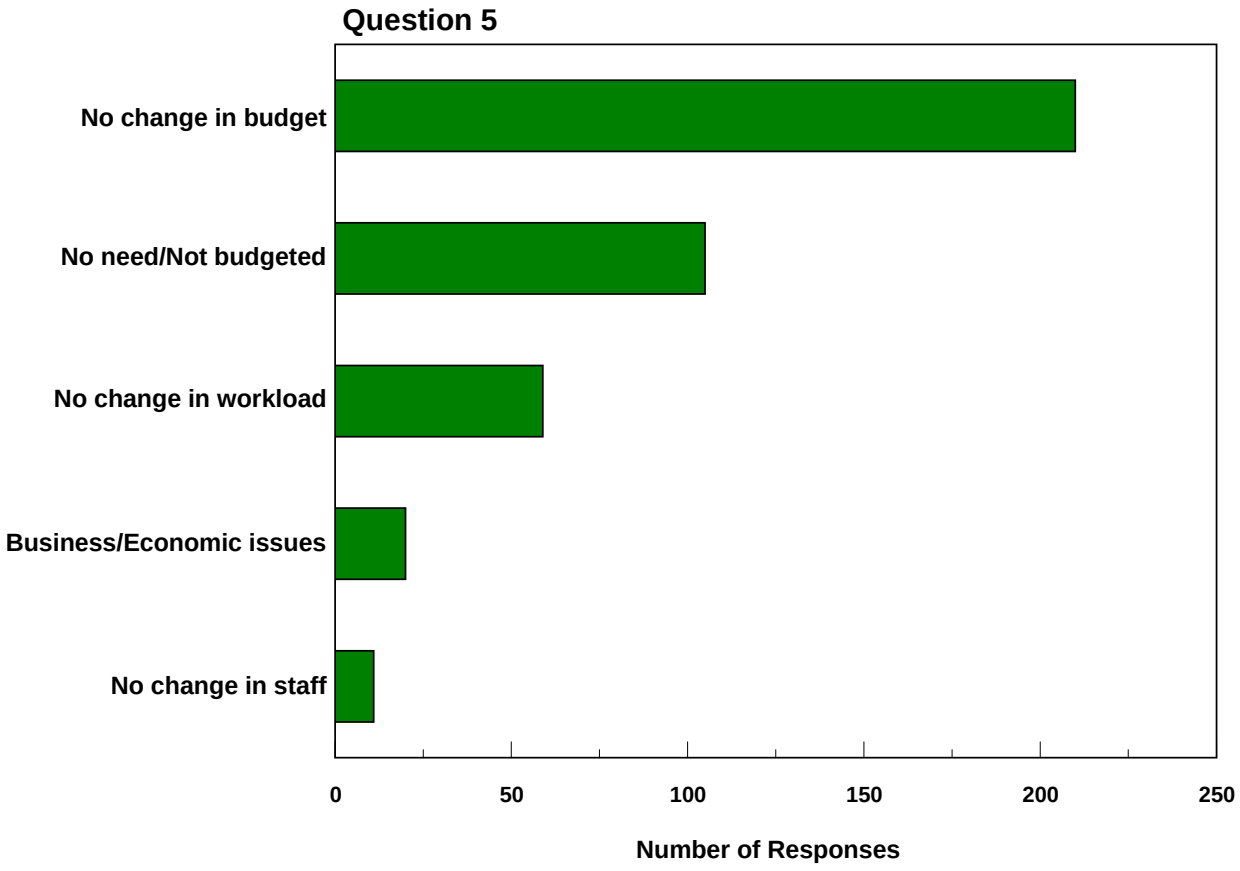
Reasons for Increase in Operating Budget for Non-Capital Equipment



Reasons for Decrease in Operating Budget for Non-Capital Equipment

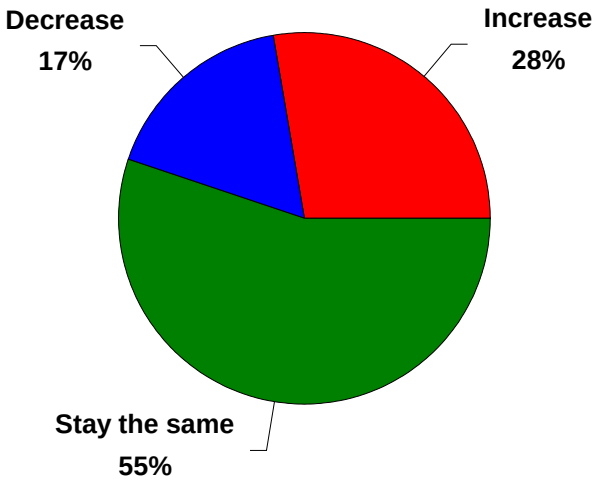


Reasons for No Change in Operating Budget for Non-Capital Equipment



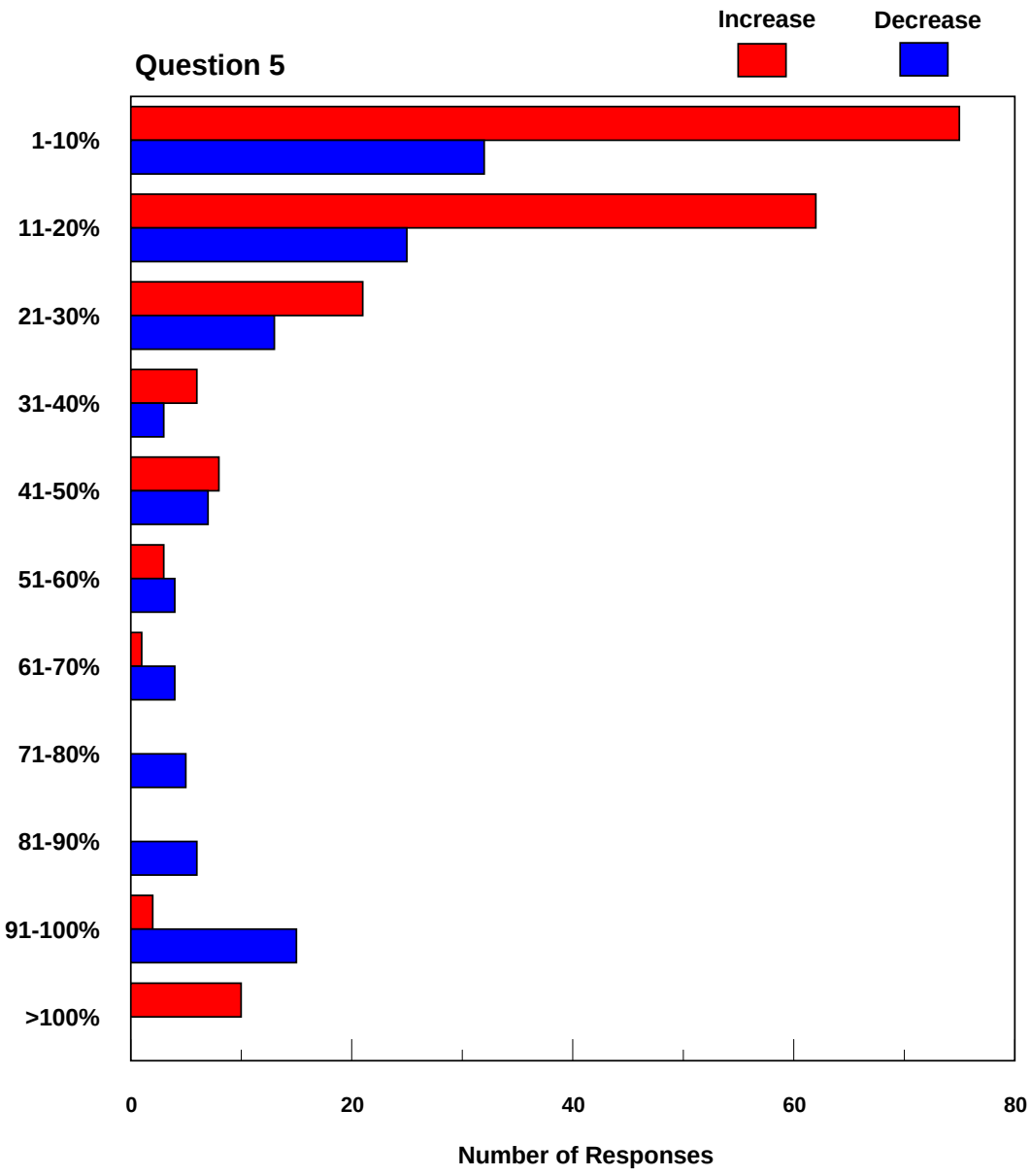
Operating Budget for Capital Equipment for Fiscal 2014 when Compared to 2013

N = 794

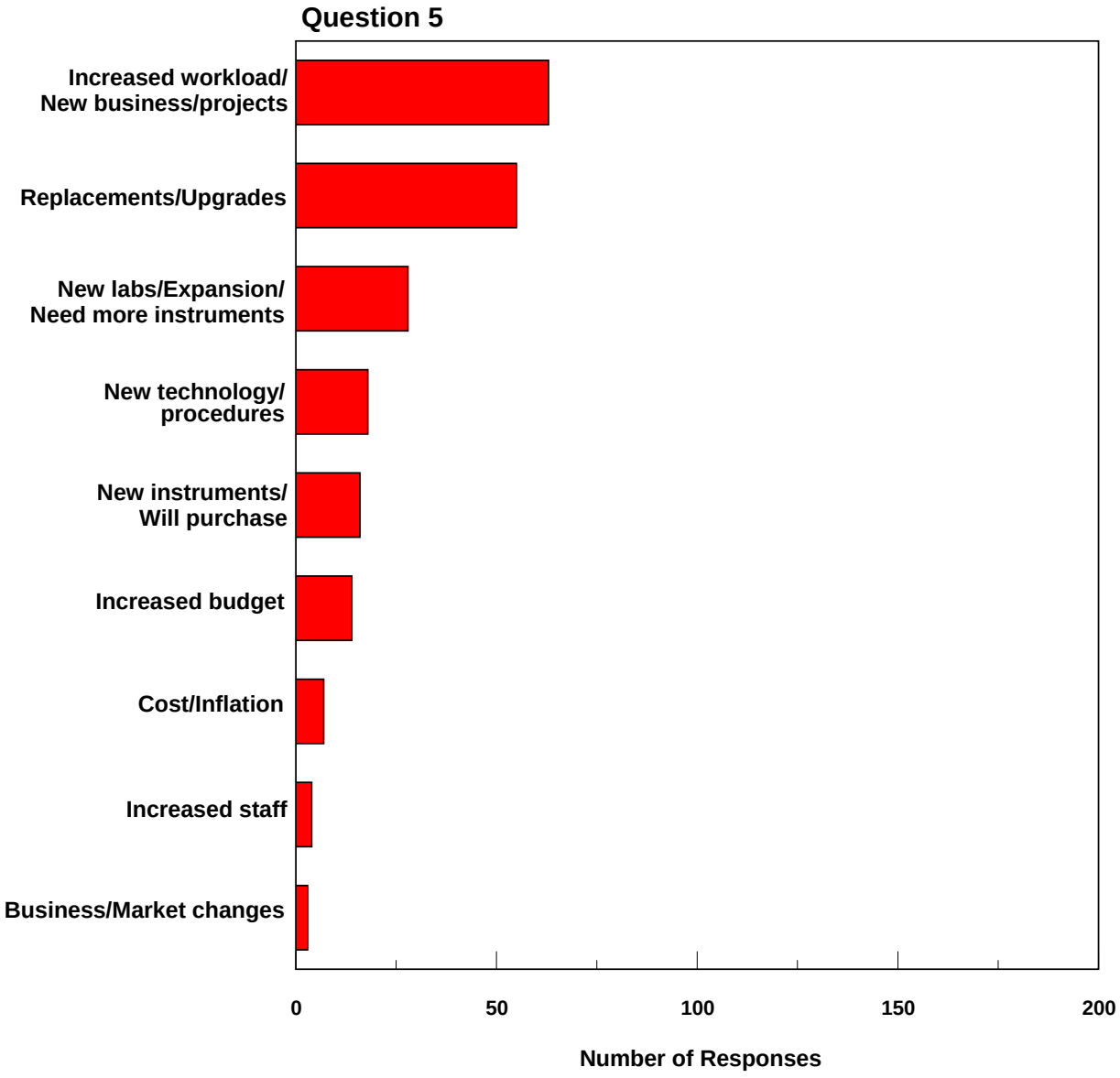


Question 5

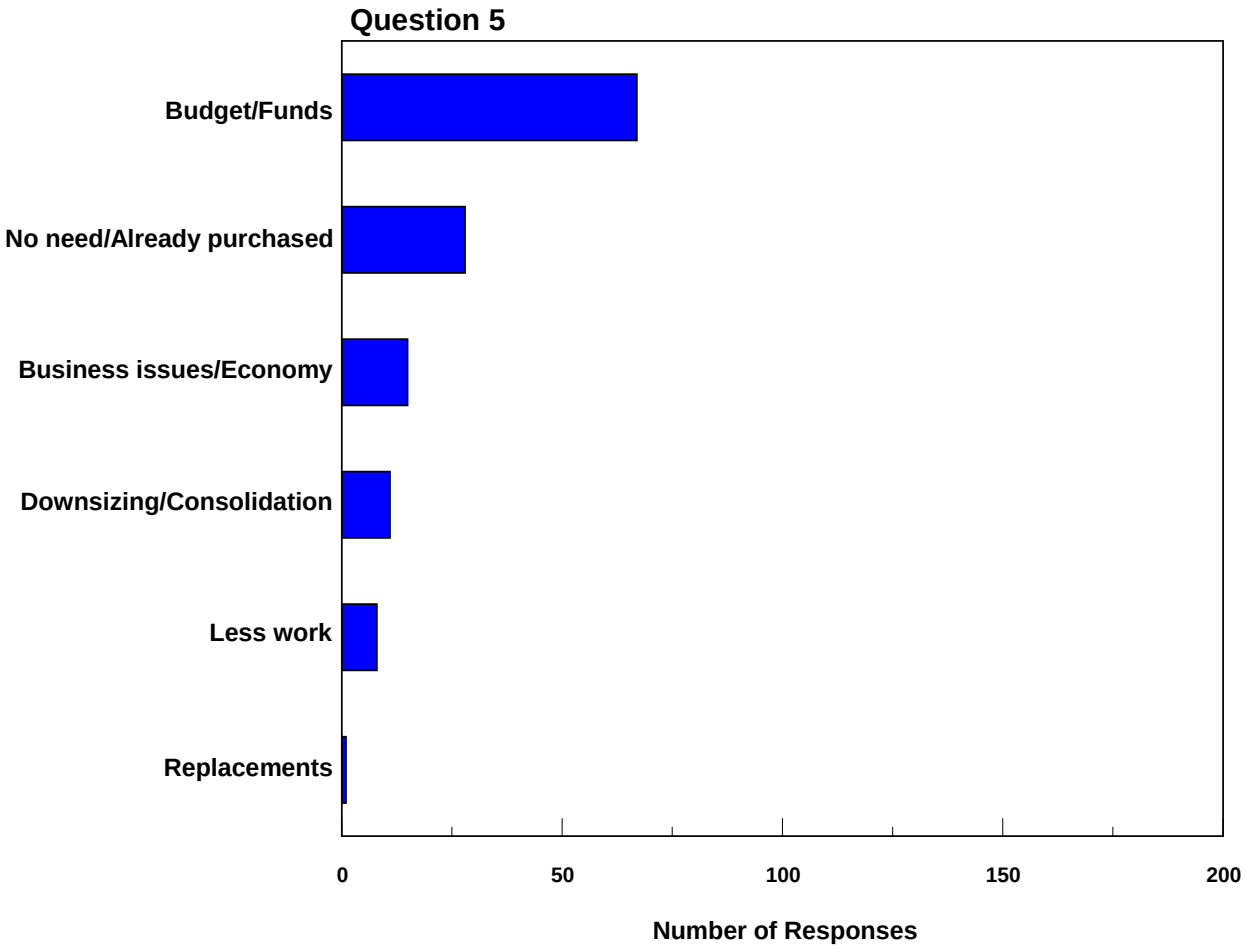
Percentage of Increase or Decrease in Operating Budget for Capital Equipment



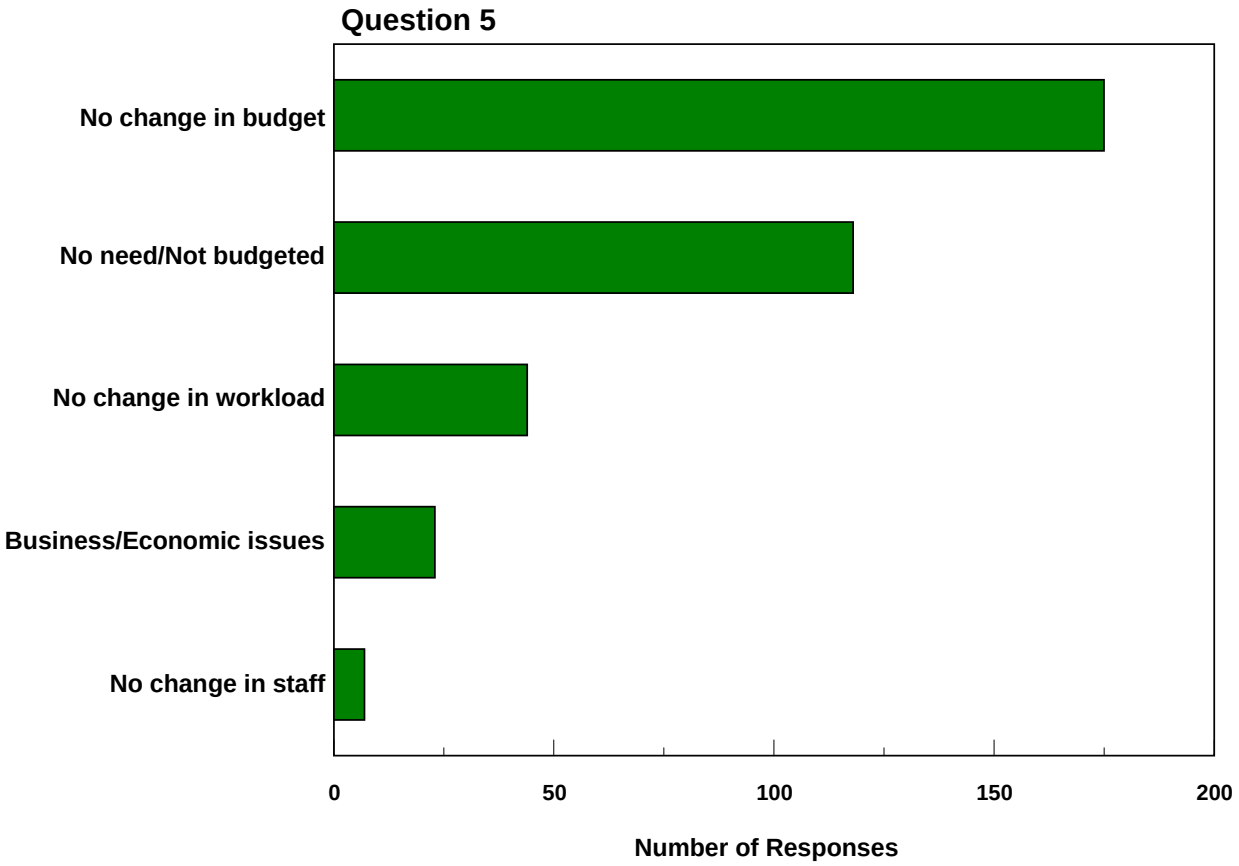
Reasons for Increase in Operating Budget for Capital Equipment



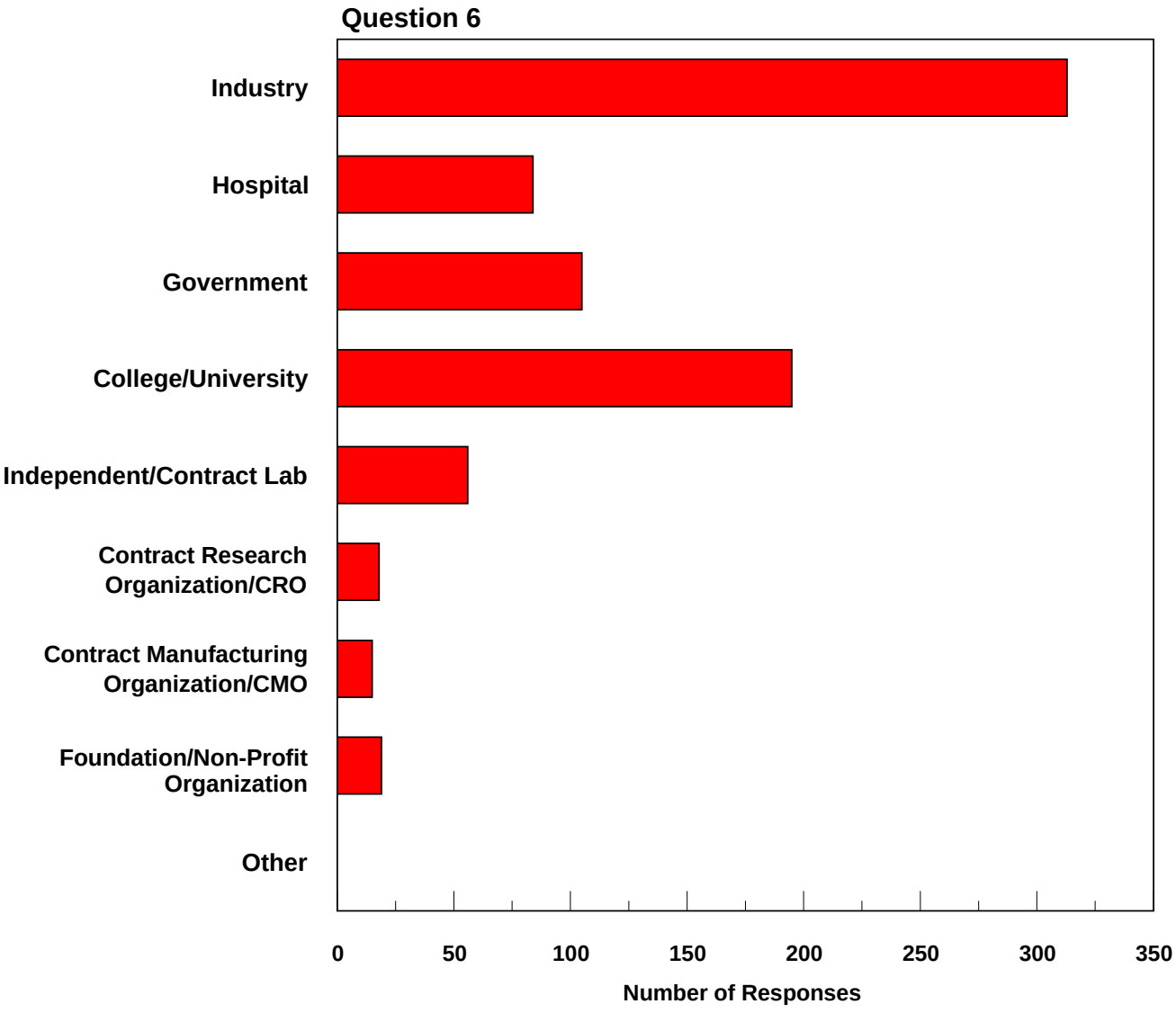
Reasons for Decrease in Operating Budget for Capital Equipment



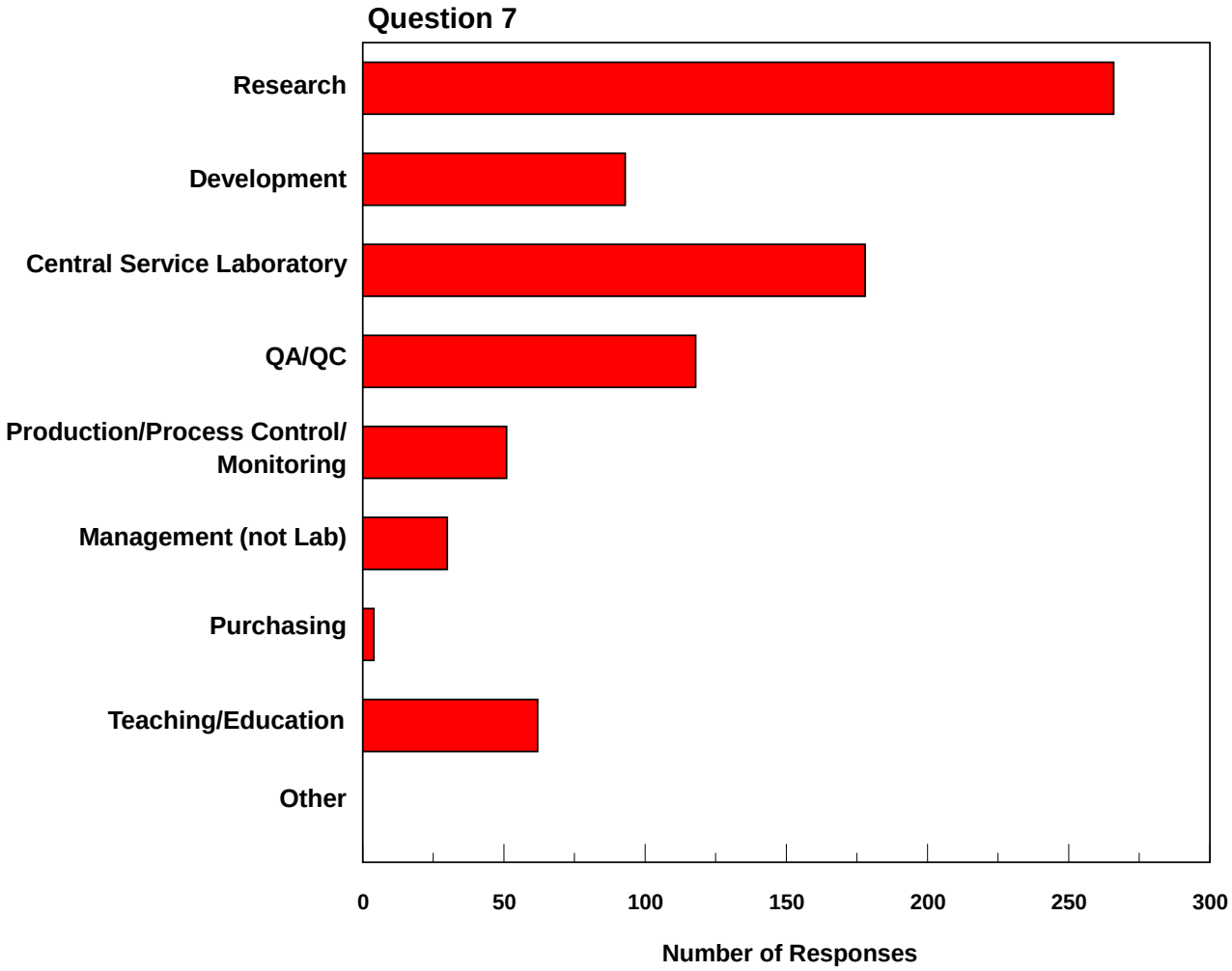
Reasons for No Change in Operating Budget for Capital Equipment



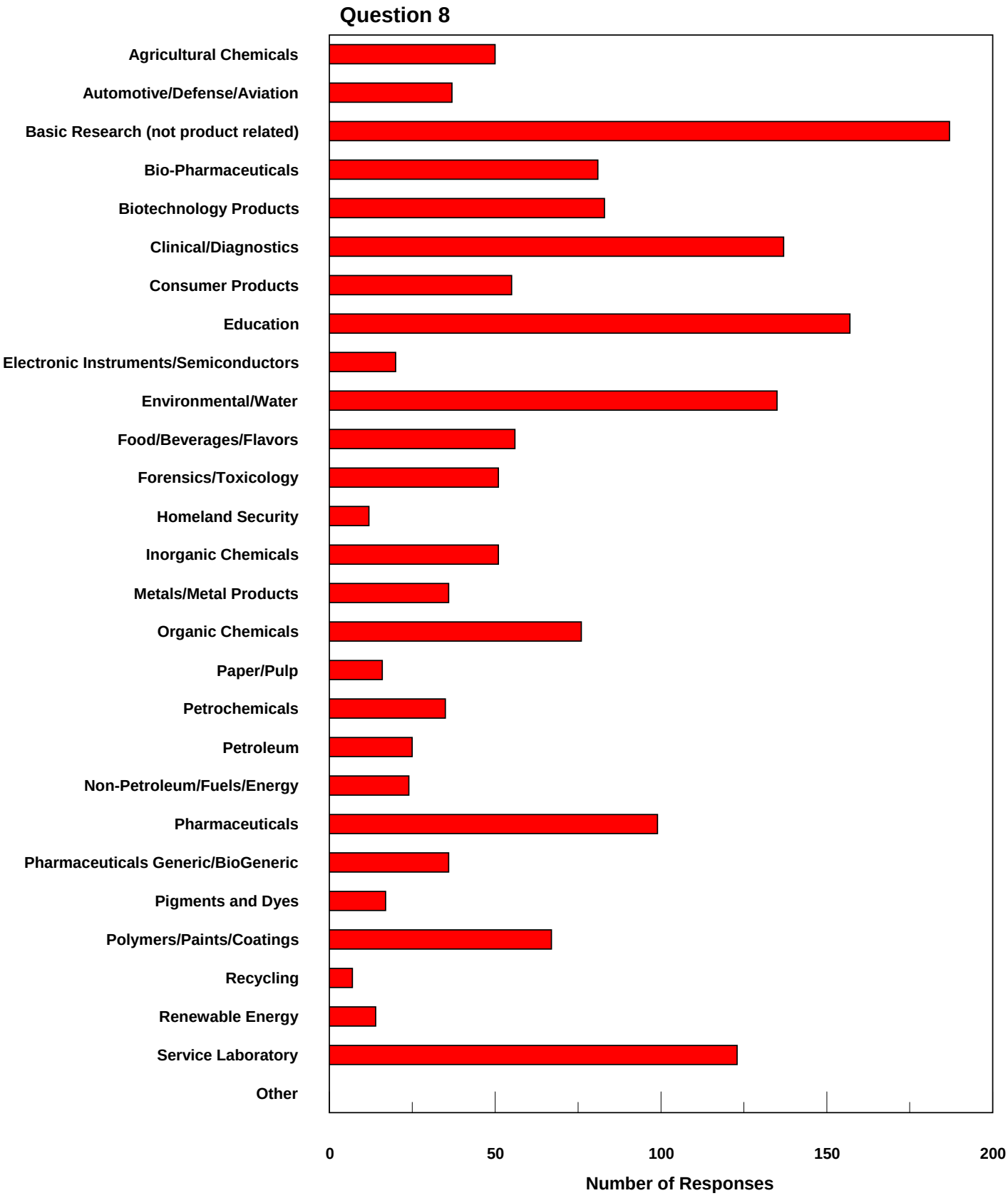
Organization Description



Department Description



Types of Products/Services Provided by Your Organization



Appendix I

North American Survey of Laboratory Purchasing Trends - January 2014

1. Which of the following best describes your laboratory personnel in 2014 as compared to 2013?			N = 811
What is the reason for your answer?			
	Responses	**Percentages**	
Increased	202	25%	
Decreased	181	23%	
Stayed the same	413	52%	
Total	**796**	**100%**	
	Increase	**Decrease**	
1-10%	95	69	
11-20%	53	42	
21-30%	18	31	
31-40%	12	13	
41-50%	4	11	
51-60%	2	4	
61-70%	1	0	
71-80%	2	0	
81-90%	0	1	
91-100%	3	3	
>100%	1	0	
Reasons for Personnel Increasing	**Responses**		
Additional personnel	144		
Additional contracts/funding/expansion	29		
Organization/Company changes	11		
Regulatory requirements	3		
Reasons for Personnel Decreasing	**Responses**		
Downsizing/Layoffs	41		
Smaller staff/No replacements	58		
Budget cuts/Funding	44		
Economy	6		
Organization/Company changes	15		
Reasons for Personnel Staying the Same	**Responses**		
No changes in workload	80		
No changes in budget/funds/contracts	122		
Organization/Company changes	14		
No need to add/No hiring	121		
Economy	23		
2. Is your organization hiring new people for the laboratory?			
	Responses	**Percentages**	
Yes, as replacement for people who have left/retired	212	26%	
Yes, increasing the staff	128	16%	
No hiring	419	52%	
No, we have layoffs and/or early retirements	43	5%	
Total	**802**	**100%**	

Laboratory Workload											
3. Which of the following best describes your workload in 2014 as compared to 2013?											
What is the reason for your answer?											
	Responses			**Percentages**							
Increased		451			57%						
Decreased		78			10%						
Stayed the same		267			34%						
Total		**796**			**100%**						
	Increase			**Decrease**							
1-10%		141			25						
11-20%		166			18						
21-30%		73			14						
31-40%		16			5						
41-50%		16			4						
51-60%		7			3						
61-70%		1			1						
71-80%		2			1						
81-90%		0			0						
91-100%		0			2						
>100%		3			0						
Reasons for Workload Increasing	**Responses**										
Decrease in personnel/Layoffs		24									
Additional projects/tests/business		251									
Budget cuts		9									
Organization/Company changes		28									
Personnel changes		9									
Regulatory requirements		14									
More productive/Responsibilities/Same staff		85									
Reasons for Workload Decreasing	**Responses**										
Budgets/Funding		22									
Business/Economy		16									
Less work		20									
Organization/Company changes		13									
Reasons for Workload Staying the Same	**Responses**										
No budget changes/cuts		43									
No need/No change in the workload		163									
Organization/Company changes		16									
Economy		16									

Questions 1 and 3											
If Workload Has Increased	**Responses**			**Percentages**							
Staff has increased		165			37%						
Staff has decreased		89			20%						
Staff has stayed the same		193			43%						
Total		**447**			**100%**						
If Workload Has Decreased	**Responses**			**Percentages**							
Staff has increased		1			1%						
Staff has decreased		47			60%						
Staff has stayed the same		30			38%						
Total		**78**			**100%**						
If Workload Has Stayed the Same	**Responses**			**Percentages**							
Staff has increased		35			13%						
Staff has decreased		41			16%						
Staff has stayed the same		187			71%						
Total		**263**			**100%**						

Spending for Laboratory Products

4. Will the spending for the following products for your laboratory increase, decrease or stay the same for fiscal 2014 when compared to 2013? What is the reason for your answer?

Chemicals, Reagents, Solvents	**Responses**	**Percentages**
Increase	318	40%
Decrease	130	16%
Stay the same	355	44%
Total	**803**	**100%**

Chemicals, Reagents, Solvents	**Increase**	**Decrease**
1-10%	133	45
11-20%	97	33
21-30%	39	21
31-40%	11	7
41-50%	4	6
51-60%	1	3
61-70%	0	1
71-80%	1	3
81-90%	0	1
91-100%	2	1
>100%	3	0

Reasons for Increase in spending - Chemicals, Reagents, Solvents	**Responses**
Increased workload/New business/projects	195
Increased staff	10
Increased budget	9
Business/Market changes	1
Cost/Inflation	35
New labs/Expansion/Need more instruments	17
New technology/procedures	25
Replacements/Upgrades	5
New instruments/Will purchase	4

Reasons for Decrease in spending - Chemicals, Reagents, Solvents	**Responses**
Budget/Funds	69
Downsizing/Consolidation	16
Less work	23
Business issues/Economy	10
No need/Already purchased	4
Replacements	0

Reasons for No Change in spending - Chemicals, Reagents, Solvents	**Responses**
No change in budget	151
No change in staff	13
No change in workload	100
Business/Economic issues	15
No need/Not budgeted	40

Glassware, Plasticware	**Responses**	**Percentages**
Increase	226	28%
Decrease	103	13%
Stay the same	469	59%
Total	**798**	**100%**
Glassware, Plasticware	**Increase**	**Decrease**
1-10%	117	29
11-20%	49	19
21-30%	23	17
31-40%	7	6
41-50%	3	7
51-60%	1	6
61-70%	1	0
71-80%	2	2
81-90%	0	0
91-100%	2	2
>100%	0	0
Reasons for Increase in spending - Glassware, Plasticware	**Responses**	
Increased workload/New business/projects	134	
Increased staff	14	
Increased budget	4	
Business/Market Changes	1	
Cost/Inflation	19	
New labs/Expansion/Need more instruments	14	
New technology/procedures	9	
Replacements/Upgrades	15	
New instruments/Will purchase	3	
Reasons for Decrease in spending - Glassware/Plasticware	**Responses**	
Budget/Funds	43	
Downsizing/Consolidation	13	
Less work	14	
Business issues/Economy	6	
No need/Already purchased	18	
Replacements	2	
Reasons for No Change in spending - Glassware/Plasticware	**Responses**	
No change in budget	169	
No change in staff	11	
No change in workload	114	
Business/Economic issues	11	
No need/Not budgeted	105	

Consumables Excluding Chemicals	**Responses**	**Percentages**
Increase	276	35%
Decrease	96	12%
Stay the same	422	53%
Total	**794**	**100%**

Consumables Excluding Chemicals	**Increase**	**Decrease**
1-10%	133	27
11-20%	61	22
21-30%	33	14
31-40%	8	9
41-50%	4	6
51-60%	3	1
61-70%	0	0
71-80%	1	2
81-90%	0	1
91-100%	2	2
>100%	0	0

Reasons for Increase in spending - Consumables Excluding Chemicals	**Responses**
Increased workload/New business/projects	173
Increased staff	14
Increased budget	7
Business/Market changes	1
Cost/Inflation	23
New labs/Expansion/Need more instruments	15
New technology/procedures	15
Replacements/Upgrades	10
New instruments/Will purchase	5

Reasons for Decrease in spending - Consumables Excluding Chemicals	**Responses**
Budget/Funds	45
Downsizing/Consolidation	12
Less work	17
Business issues/Economy	7
No need/Already purchased	6
Replacements	1

Reasons for No Change in spending - Consumables Excluding Chemicals	**Responses**
No change in budget	138
No change in staff	12
No change in workload	122
Business/Economic issues	9
No need/Not budgeted	79

Laboratory Equipment <$2,500	**Responses**	**Percentages**
Increase	188	24%
Decrease	115	14%
Stay the same	497	62%
Total	**800**	**100%**
Laboratory Equipment <$2,500	**Increase**	**Decrease**
1-10%	87	24
11-20%	57	24
21-30%	13	9
31-40%	2	4
41-50%	4	10
51-60%	2	3
61-70%	0	2
71-80%	2	6
81-90%	0	4
91-100%	1	7
>100%	2	0
Reasons for Increase in spending - Laboratory Equipment <$2,500	**Responses**	
Increased workload/New business/projects	64	
Increased staff	8	
Increased budget	8	
Business/Market changes	0	
Cost/Inflation	5	
New labs/Expansion/Need more instruments	17	
New technology/procedures	9	
Replacements/Upgrades	62	
New instruments/Will purchase	5	
Reasons for Decrease in spending - Laboratory Equipment <$2,500	**Responses**	
Budget/Funds	44	
Downsizing/Consolidation	13	
Less work	7	
Business issues/Economy	7	
No need/Already purchased	31	
Replacements	3	
Reasons for No Change in spending - Laboratory Equipment <$2,500	**Responses**	
No change in budget	180	
No change in staff	9	
No change in workload	64	
Business/Economic issues	14	
No need/Not budgeted	161	

Laboratory Equipment >$2,500	**Responses**	**Percentages**
Increase	198	25%
Decrease	110	14%
Stay the same	484	61%
Total	**792**	**100%**
Laboratory Equipment >$2,500	**Increase**	**Decrease**
1-10%	97	32
11-20%	41	12
21-30%	17	11
31-40%	9	2
41-50%	3	1
51-60%	2	3
61-70%	0	5
71-80%	0	5
81-90%	1	7
91-100%	1	13
>100%	4	0
Reasons for Increase in spending - Laboratory Equipment >$2,500	**Responses**	
Increased workload/New business/projects	61	
Increased staff	5	
Increased budget	13	
Business/Market changes	1	
Cost/Inflation	4	
New labs/Expansion/Need more instruments	24	
New technology/procedures	13	
Replacements/Upgrades	51	
New instruments/Will purchase	11	
Reasons for Decrease in spending - Laboratory Equipment >$2,500	**Responses**	
Budget/Funds	46	
Downsizing/Consolidation	10	
Less work	7	
Business issues/Economy	7	
No need/Already purchased	28	
Replacements	1	
Reasons for No Change in spending - Laboratory Equipment >$2,500	**Responses**	
No change in budget	157	
No change in staff	3	
No change in workload	55	
Business/Economic issues	18	
No need/Not budgeted	176	

Laboratory Instruments <$5,000	**Responses**	**Percentages**
Increase	140	18%
Decrease	102	13%
Stay the same	554	70%
Total	**796**	**100%**
Laboratory Instruments <$5,000	**Increase**	**Decrease**
1-10%	66	27
11-20%	35	10
21-30%	10	9
31-40%	6	6
41-50%	1	6
51-60%	0	1
61-70%	0	3
71-80%	0	3
81-90%	1	4
91-100%	3	13
>100%	0	0
Reasons for Increase in spending - Laboratory Instruments <$5,000	**Responses**	
Increased workload/New business/projects	47	
Increased staff	8	
Increased budget	3	
Business/Market changes	0	
Cost/Inflation	3	
New labs/Expansion/Need more instruments	17	
New technology/procedures	9	
Replacements/Upgrades	42	
New instruments/Will purchase	7	
Reasons for Decrease in spending - Laboratory Instruments <$5,000	**Responses**	
Budget/Funds	43	
Downsizing/Consolidation	11	
Less work	2	
Business issues/Economy	6	
No need/Already purchased	28	
Replacements	2	
Reasons for No Change in spending - Laboratory Instruments <$5,000	**Responses**	
No change in budget	178	
No change in staff	3	
No change in workload	63	
Business/Economic issues	12	
No need/Not budgeted	206	

Laboratory Instruments >$5,000	**Responses**	**Percentages**
Increase	230	29%
Decrease	114	14%
Stay the same	448	57%
Total	**792**	**100%**
Laboratory Instruments >$5,000	**Increase**	**Decrease**
1-10%	88	22
11-20%	59	15
21-30%	22	7
31-40%	7	6
41-50%	6	6
51-60%	2	2
61-70%	3	2
71-80%	1	9
81-90%	1	1
91-100%	2	23
>100%	8	0
Reasons for Increase in spending - Laboratory Instruments >$5,000	**Responses**	
Increased workload/New business/projects	67	
Increased staff	6	
Increased budget	7	
Business/Market changes	2	
Cost/Inflation	2	
New labs/Expansion/Need more instruments	19	
New technology/procedures	24	
Replacements/Upgrades	71	
New instruments/Will purchase	24	
Reasons for Decrease in spending - Laboratory Instruments >$5,000	**Responses**	
Budget/Funds	52	
Downsizing/Consolidation	10	
Less work	5	
Business issues/Economy	6	
No need/Already purchased	28	
Replacements	2	
Reasons for No Change in spending - Laboratory Instruments >$5,000	**Responses**	
No change in budget	143	
No change in staff	5	
No change in workload	53	
Business/Economic issues	13	
No need/Not budgeted	161	

Laboratory Furniture	**Responses**	**Percentages**
Increase	96	12%
Decrease	94	12%
Stay the same	605	76%
Total	**795**	**100%**
Laboratory Furniture	**Increase**	**Decrease**
1-10%	47	23
11-20%	14	9
21-30%	8	4
31-40%	3	2
41-50%	7	6
51-60%	0	0
61-70%	0	0
71-80%	0	4
81-90%	1	3
91-100%	2	17
>100%	5	0
Reasons for Increase in spending - Laboratory Furniture	**Responses**	
Increased workload/New business/projects	24	
Increased staff	12	
Increased budget	1	
Business/Market Changes	0	
Cost/Inflation	0	
New labs/Expansion/Need more instruments	26	
New technology/procedures	1	
Replacements/Upgrades	27	
New instruments/Will purchase	0	
Reasons for Decrease in spending - Laboratory Furniture	**Responses**	
Budget/Funds	22	
Downsizing/Consolidation	12	
Less work	2	
Business issues/Economy	5	
No need/Already purchased	43	
Replacements	1	
Reasons for No Change in spending - Laboratory Furniture	**Responses**	
No change in budget	155	
No change in staff	28	
No change in workload	49	
Business/Economic issues	15	
No need/Not budgeted	262	

Laboratory Automation	**Responses**	**Percentages**
Increase	139	17%
Decrease	71	9%
Stay the same	587	74%
Total	**797**	**100%**
Laboratory Automation	**Increase**	**Decrease**
1-10%	57	18
11-20%	35	6
21-30%	18	3
31-40%	2	3
41-50%	2	2
51-60%	2	1
61-70%	0	3
71-80%	1	5
81-90%	0	2
91-100%	2	12
>100%	3	0
Reasons for Increase in spending - Laboratory Automation	**Responses**	
Increased workload/New business/projects	57	
Increased staff	1	
Increased budget	6	
Business/Market changes	3	
Cost/Inflation	1	
New labs/Expansion/Need more instruments	6	
New technology/procedures	30	
Replacements/Upgrades	19	
New instruments/Will purchase	10	
Reasons for Decrease in spending - Laboratory Automation	**Responses**	
Budget/Funds	25	
Downsizing/Consolidation	11	
Less work	4	
Business issues/Economy	7	
No need/Already purchased	18	
Replacements	1	
Reasons for No Change in spending - Laboratory Automation	**Responses**	
No change in budget	160	
No change in staff	13	
No change in workload	63	
Business/Economic issues	11	
No need/Not budgeted	242	

Capital and Non-Capital Equipment

5. Will the Operating Budget for Non-Capital Equipment for your laboratory increase, decrease or stay the same for fiscal 2014 when compared to 2013? What is the reason for your answer?

	Responses	Percentages
Increase	195	25%
Decrease	123	15%
Stay the same	477	60%
Total	**795**	**100%**

Percentage of change	**Increase**	**Decrease**
1-10%	99	38
11-20%	53	28
21-30%	12	10
31-40%	4	8
41-50%	0	3
51-60%	3	4
61-70%	0	2
71-80%	0	3
81-90%	0	2
91-100%	1	6
>100%	3	0

Reasons for Increase	**Responses**
Increased workload/New business/projects	93
Increased staff	13
Increased budget	18
Business/Market changes	2
Cost/Inflation	27
New labs/Expansion/Need more instruments	14
New technology/procedures	5
Replacements/Upgrades	13
New instruments/Will purchase	0

Reasons for Decrease	**Responses**
Budget/Funds	69
Downsizing/Consolidation	14
Less work	11
Business issues/Economy	12
No need/Already purchased	9
Replacements	0

Reasons for No Change	**Responses**
No change in budget	210
No change in staff	11
No change in workload	59
Business/Economic issues	20
No need/Not budgeted	105

Will the Capital Equipment Budget for your laboratory increase, decrease or stay the same for fiscal 2014 when compared to 2013? What is the reason for your answer?

	Responses	Percentages
Increase	220	28%
Decrease	136	17%
Stay the same	438	55%
Total	**794**	**100%**

Percentage of change	**Increase**	**Decrease**
1-10%	75	32
11-20%	62	25
21-30%	21	13
31-40%	6	3
41-50%	8	7
51-60%	3	4
61-70%	1	4
71-80%	0	5
81-90%	0	6
91-100%	2	15
>100%	10	0

Reasons for Increase	**Responses**
Increased workload/New business/projects	63
Increased staff	4
Increased budget	14
Business/Market changes	3
Cost/Inflation	7
New labs/Expansion/Need more instruments	28
New technology/procedures	18
Replacements/Upgrades	55
New instruments/Will purchase	16

Reasons for Decrease	**Responses**
Budget/Funds	67
Downsizing/Consolidation	11
Less work	8
Business issues/Economy	15
No need/Already purchased	28
Replacements	1

Reasons for No Change	**Responses**
No change in budget	175
No change in staff	7
No change in workload	44
Business/Economic issues	23
No need/Not budgeted	118

6. Which of the following best describes your organization?		
	Responses	Percentages
Industry	313	39%
Hospital	84	10%
Government	105	13%
College/University	195	24%
Independent/Contract Lab	56	7%
Contract Research Organization/CRO	18	2%
Contract Manufacturing Organization/CMO	15	2%
Foundation/Non-Profit Organization	19	2%
Other	0	0%
Total	**805**	**100%**

7. Which of the following best describes your department?		
	Responses	Percentages
Research	266	33%
Development	93	12%
Central Service Laboratory	178	22%
QA/QC	118	15%
Production/Process Control Monitoring	51	6%
Management (not lab)	30	4%
Purchasing	4	0%
Teaching/Education	62	8%
Other	0	0%
Total	**802**	**100%**

8. What types of products/services does your organization provide?	
	Responses
Agricultural Chemicals	50
Automotive/Defense/Aviation	37
Basic Research (not product related)	187
Bio-Pharmaceuticals	81
Biotechnology Products	83
Clinical/Diagnostics	137
Consumer Products	55
Education	157
Electronic Instruments/Semiconductors	20
Environmental/Water	135
Food/Beverages/Flavors	56
Forensics/Toxicology	51
Homeland Security	12
Inorganic Chemicals	51
Metals/Metal Products	36
Organic Chemicals	76
Paper/Pulp	16
Petrochemicals	35
Petroleum	25
Non-Petroleum/Fuels/Energy	24
Pharmaceuticals	99
Pharmaceuticals Generic/BioGeneric	36
Pigments and Dyes	17
Polymers/Paints/Coatings	67
Recycling	7
Renewable Energy	14
Service Laboratory	123
Other	0

Appendix II

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

Industry N = 313	Hospital N = 84	Government N = 105	College/ University N = 195	Independent/ Contract Lab N = 56

1. Which of the following best describes your laboratory personnel in 2014 as compared to 2013? What is the reason for your answer?

	Responses				
	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increased	82	15	22	52	15
Decreased	42	32	29	47	17
Stayed the same	183	36	53	93	22
Total	**307**	**83**	**104**	**192**	**54**
	Percentages				
Increased	27%	18%	21%	27%	28%
Decreased	14%	39%	28%	24%	31%
Stayed the same	60%	43%	51%	48%	41%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

	Industry		Hospital		Government		College/University		Independent/Contract Lab	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	32	13	10	17	17	14	20	10	10	11
11-20%	26	9	1	6	2	5	14	11	3	4
21-30%	7	7	1	5	1	5	7	11	0	2
31-40%	8	4	1	1	0	2	2	4	0	0
41-50%	1	3	1	0	0	2	2	6	0	0
51-60%	1	0	0	1	0	0	1	3	0	0
61-70%	0	0	0	0	0	0	1	0	0	0
71-80%	0	0	1	0	0	0	0	0	1	0
81-90%	0	1	0	0	0	0	0	0	0	0
91-100%	1	1	0	0	1	1	1	1	0	0
>100%	0	0	0	0	0	0	0	0	1	0

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

Question 1 (cont'd)

Reasons for Laboratory Personnel Increasing	Industry	Hospital	Government	College/University	Independent/Contract Lab
Additional personnel	57	9	16	40	9
Additional contracts/funding/expansion	9	3	1	8	5
Organization/Company changes	6	2	2	0	1
Regulatory requirements	1	0	2	0	0

Reasons for Laboratory Personnel Decreasing					
Downsizing/Layoffs	16	7	4	3	6
Smaller staff/No replacements	12	11	14	16	3
Budget cuts/Funding	5	6	7	19	3
Economy	1	1	1	1	1
Organization/Company changes	7	0	2	2	3

Reasons for Laboratory Personnel Staying the Same					
No changes in workload	38	5	4	19	8
No changes in budgets/funds/contracts	52	7	24	31	2
Organization/Company changes	8	2	1	2	0
No need to add/no hiring	54	15	12	22	10
Economy	13	2	3	3	0

2. Is your organization hiring new people for the laboratory?

Responses

	Industry	Hospital	Government	College/University	Independent/Contract Lab
Yes, as replacement for people who have left/retired	80	42	27	34	16
Yes, increasing the staff	51	11	12	30	9
No hiring	165	23	60	119	28
No, we have layoffs and/or early retirements	15	8	5	10	2
Total	**311**	**84**	**104**	**193**	**55**

Percentages

Yes, as replacement for people who have left/retired	26%	50%	26%	18%	29%
Yes, increasing the staff	16%	13%	12%	16%	16%
No hiring	53%	27%	58%	62%	51%
No, we have layoffs and/or early retirements	5%	10%	5%	5%	4%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

3. Which of the following best describes your workload in 2014 as compared to 2013?

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

Responses

	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increased	194	42	58	95	30
Decreased	15	19	12	19	7
Stayed the same	100	22	33	78	17
Total	**309**	**83**	**103**	**192**	**54**

Percentages

Increased	63%	51%	56%	49%	56%
Decreased	5%	23%	12%	10%	13%
Stayed the same	32%	27%	32%	41%	31%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

	Industry		Hospital		Government		College/University		Independent/Contract Lab	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	56	3	21	13	23	3	20	4	12	1
11-20%	78	3	11	2	19	3	32	6	12	4
21-30%	29	3	5	2	11	2	19	5	3	0
31-40%	6	3	3	1	0	0	4	1	1	0
41-50%	6	0	0	0	0	1	9	1	0	0
51-60%	5	0	0	1	0	1	2	1	0	0
61-70%	0	0	0	0	0	0	1	0	0	1
71-80%	0	1	1	0	0	0	0	0	1	0
81-90%	0	0	0	0	0	0	0	0	0	0
91-100%	0	1	0	0	0	0	0	0	0	0
>100%	0	0	0	0	0	0	2	0	1	0

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

Question 3 (cont'd)

Reasons for Workload Increasing	Industry	Hospital	Government	College/University	Independent/Contract Lab
Decrease in personnel/Layoffs	4	3	2	8	3
Additional projects/tests/business	121	18	28	43	21
Budget cuts	1	0	1	7	0
Organization/Company changes	17	2	2	4	3
Personnel changes	2	0	2	5	0
Regulatory requirements	2	1	9	1	0
More productive/Responsibilities/Same staff	35	9	12	21	2
Reasons for Workload Decreasing					
Budgets/Funding	2	0	5	14	0
Business/Economy	5	6	1	1	1
Less work	5	8	1	1	4
Organization/Company changes	2	2	4	3	0
Reasons for Workload Staying the Same					
No budget changes/cuts	17	5	4	13	3
No need/No change in the workload	57	12	19	51	12
Organization/Company changes	9	1	2	2	0
Economy	6	1	2	4	1

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

Questions 1 and 3 (cont'd)

	Responses				
If Workload Has Increased	**Industry**	**Hospital**	**Government**	**College/University**	**Independent/Contract Lab**
Staff has increased	72	13	16	38	11
Staff has decreased	22	11	12	26	12
Staff has stayed the same	97	18	29	31	7
Total	**191**	**42**	**57**	**95**	**30**

If Workload Has Decreased					
Staff has increased	0	0	0	1	0
Staff has decreased	7	14	8	10	3
Staff has stayed the same	8	5	4	8	4
Total	**15**	**19**	**12**	**19**	**7**

If Workload Has Stayed the Same					
Staff has increased	10	1	6	13	4
Staff has decreased	11	7	9	10	2
Staff has stayed the same	77	13	18	54	11
Total	**98**	**21**	**33**	**77**	**17**

If Workload Has Increased	**Percentages**				
Staff has increased	38%	31%	28%	40%	37%
Staff has decreased	12%	26%	21%	27%	40%
Staff has stayed the same	51%	43%	51%	33%	23%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

If Workload Has Decreased					
Staff has increased	0%	0%	0%	5%	0%
Staff has decreased	47%	74%	67%	53%	43%
Staff has stayed the same	53%	26%	33%	42%	57%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

If Workload Has Stayed the Same					
Staff has increased	10%	5%	18%	17%	24%
Staff has decreased	11%	33%	27%	13%	12%
Staff has stayed the same	79%	62%	55%	70%	65%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

4. Will the spending for the following products for your laboratory increase, decrease or stay the same for fiscal 2014 when compared to 2013?

	Responses				
Chemicals, Reagents, Solvents	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increase	131	33	42	64	23
Decrease	29	24	20	43	7
Stay the same	151	27	43	87	24
Total	**311**	**84**	**105**	**194**	**54**

	Percentages				
Increase	42%	39%	40%	33%	43%
Decrease	9%	29%	19%	22%	13%
Stay the same	49%	32%	41%	45%	44%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Chemicals, Reagents, Solvents

	Industry		Hospital		Government		College/University		Independent/Contract Lab	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	52	12	18	13	21	6	21	8	12	3
11-20%	33	7	10	2	10	6	26	15	8	3
21-30%	17	3	2	3	6	4	11	10	1	0
31-40%	5	2	0	1	2	0	2	3	0	0
41-50%	2	1	0	0	1	0	1	3	0	0
51-60%	1	0	0	1	0	0	0	2	0	0
61-70%	0	1	0	0	0	0	0	0	0	0
71-80%	1	0	0	1	0	1	0	0	0	1
81-90%	0	1	0	0	0	0	0	0	0	0
91-100%	1	1	0	0	0	0	0	0	1	0
>100%	1	0	1	0	1	0	0	0	0	0

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

Question 4 (cont'd)

Chemicals, Reagents, Solvents

Reasons for Increase in spending	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increased workload/New business/projects	82	18	25	36	16
Increased staff	4	1	0	4	0
Increased budget	1	0	2	6	0
Business/Market changes	1	0	0	0	0
Cost/Inflation	16	4	7	4	4
New labs/Expansion/Need more instruments	2	1	4	6	2
New technology/procedures	11	4	3	4	0
Replacements/Upgrades	4	0	0	0	1
New instruments/Will purchase	3	1	0	0	0
Reasons for Decrease in spending					
Budget/Funds	10	9	12	33	1
Downsizing/Consolidation	8	3	2	2	1
Less work	5	7	3	3	3
Business issues/Economy	3	3	0	2	1
No need/Already purchased	2	0	0	1	1
Replacements	0	0	0	0	0
Reasons for No Change in spending					
No change in budget	61	10	23	40	10
No change in staff	10	1	1	1	0
No change in workload	34	7	13	23	7
Business/Economic issues	8	1	0	5	1
No need/Not budgeted	24	2	2	9	3

Responses

Glassware, Plasticware	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increase	90	21	28	47	20
Decrease	19	14	18	37	6
Stay the same	197	49	59	108	30
Total	**306**	**84**	**105**	**192**	**56**

Percentages

Increase	29%	25%	27%	24%	36%
Decrease	6%	17%	17%	19%	11%
Stay the same	64%	58%	56%	56%	54%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

Question 4 (cont'd) **Glassware, Plasticware**

	Industry		Hospital		Government		College/University		Independent/Contract Lab	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	46	6	14	7	13	6	20	5	14	2
11-20%	18	4	4	1	4	5	14	6	3	2
21-30%	9	2	1	2	5	3	7	10	1	0
31-40%	2	2	0	1	2	0	3	2	0	0
41-50%	0	0	0	0	2	1	1	4	0	0
51-60%	1	0	0	2	0	0	0	4	0	0
61-70%	1	0	0	0	0	0	0	0	0	0
71-80%	1	0	1	0	0	1	0	0	0	1
81-90%	0	0	0	0	0	0	0	0	0	0
91-100%	1	2	0	0	0	0	0	0	1	0
>100%	0	0	0	0	0	0	0	0	0	0

Glassware, Plasticware

Reasons for Increase in spending	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increased workload/New business/projects	57	15	12	26	9
Increased staff	6	1	2	3	0
Increased budget	1	0	0	2	1
Business/Market changes	0	0	1	0	0
Cost/Inflation	9	0	2	2	5
New labs/Expansion/Need more instruments	3	0	4	4	2
New technology/procedures	3	1	2	3	0
Replacements/Upgrades	3	0	2	6	3
New instruments/Will purchase	3	0	0	0	0
Reasons for Decrease in spending					
Budget/Funds	6	3	11	20	1
Downsizing/Consolidation	6	3	1	2	1
Less work	3	4	2	1	3
Business issues/Economy	1	1	0	1	0
No need/Already purchased	2	2	2	8	1
Replacements	0	1	0	1	0
Reasons for No Change in spending					
No change in budget	73	16	28	36	9
No change in staff	9	0	0	2	0
No change in workload	44	10	11	27	11
Business/Economic issues	4	1	2	2	1
No need/Not budgeted	49	12	10	25	5

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

Question 4 (cont'd)

Responses

Consumables Excluding Chemicals	**Industry**	**Hospital**	**Government**	**College/University**	**Independent/Contract Lab**
Increase	116	22	40	56	22
Decrease	18	13	19	36	6
Stay the same	177	48	45	98	24
Total	**311**	**83**	**104**	**190**	**52**

Percentages

Increase	37%	27%	38%	29%	42%
Decrease	6%	16%	18%	19%	12%
Stay the same	57%	58%	43%	52%	46%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Consumables Excluding Chemicals

	Industry		**Hospital**		**Government**		**College/University**		**Independent/Contract Lab**	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	55	7	16	5	22	6	19	6	14	2
11-20%	25	6	3	0	9	5	16	10	3	1
21-30%	9	0	0	2	6	1	14	10	2	0
31-40%	6	2	0	2	0	1	0	3	0	0
41-50%	1	1	0	0	2	1	1	3	0	0
51-60%	2	0	0	0	1	0	0	1	0	0
61-70%	0	0	0	0	0	0	0	0	0	0
71-80%	0	0	1	1	0	1	0	0	0	0
81-90%	0	0	0	0	0	0	0	0	0	1
91-100%	1	1	0	1	0	0	0	0	1	0
>100%	0	0	0	0	0	0	0	0	0	0

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

Question 4 (cont'd) — **Consumables excluding chemicals**

Reasons for Increase in spending	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increased workload/New business/projects	76	15	22	33	10
Increased staff	5	2	1	5	0
Increased budget	3	0	0	2	1
Business/Market changes	0	0	0	0	1
Cost/Inflation	12	0	4	2	4
New labs/Expansion/Need more instruments	2	0	3	6	4
New technology/procedures	4	2	4	3	2
Replacements/Upgrades	5	0	1	4	0
New instruments/Will purchase	4	0	1	0	0
Reasons for Decrease in spending					
Budget/Funds	6	2	11	24	0
Downsizing/Consolidation	6	2	2	1	1
Less work	3	3	4	4	2
Business issues/Economy	1	3	0	1	1
No need/Already purchased	2	0	0	3	1
Replacements	0	1	0	0	0
Reasons for No Change in spending					
No change in budget	57	12	19	31	10
No change in staff	8	1	1	2	0
No change in workload	43	13	11	30	10
Business/Economic issues	5	1	0	2	0
No need/Not budgeted	40	9	7	18	2

Responses

Laboratory Equipment <$2,500	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increase	70	20	24	40	19
Decrease	21	14	23	44	4
Stay the same	218	50	58	107	32
Total	**309**	**84**	**105**	**191**	**55**

Percentages

Increase	23%	24%	23%	21%	35%
Decrease	7%	17%	22%	23%	7%
Stay the same	71%	60%	55%	56%	58%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

Question 4 (cont'd) **Laboratory Equipment <$2,500**

	Industry		Hospital		Government		College/University		Independent/Contract Lab	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	27	7	13	2	11	4	14	7	13	2
11-20%	26	2	5	3	8	7	13	9	2	1
21-30%	8	0	0	1	1	1	3	6	0	0
31-40%	0	1	0	1	0	0	1	2	0	0
41-50%	1	3	0	2	1	3	2	2	0	0
51-60%	1	2	0	0	1	0	0	1	0	0
61-70%	0	0	0	0	0	0	0	2	0	0
71-80%	1	0	1	0	0	2	0	3	0	0
81-90%	0	1	0	0	0	0	0	1	0	1
91-100%	1	1	0	2	0	1	0	3	0	0
>100%	1	0	0	0	0	0	0	0	1	0

Laboratory Equipment <$2,500

Reasons for Increase in spending	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increased workload/New business/projects	26	5	5	14	7
Increased staff	4	1	1	1	0
Increased budget	4	0	0	4	0
Business/Market changes	0	0	0	0	0
Cost/Inflation	2	0	1	0	2
New labs/Expansion/Need more instruments	5	1	5	4	2
New technology/procedures	6	1	0	1	0
Replacements/Upgrades	16	11	11	11	8
New instruments/Will purchase	2	0	1	2	0
Reasons for Decrease in spending					
Budget/Funds	5	3	13	21	1
Downsizing/Consolidation	6	2	1	1	2
Less work	2	1	2	1	0
Business issues/Economy	1	1	1	1	0
No need/Already purchased	5	4	3	15	1
Replacements	2	1	0	0	0
Reasons for No Change in spending					
No change in budget	80	18	23	39	12
No change in staff	8	0	0	0	0
No change in workload	26	3	4	16	7
Business/Economic issues	9	1	1	2	1
No need/Not budgeted	70	15	19	37	9

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Organization Cross Tabulations

Question 4 (cont'd)

Responses

Laboratory Equipment >$2,500	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increase	81	20	27	35	18
Decrease	25	12	19	40	6
Stay the same	203	47	58	116	31
Total	**309**	**79**	**104**	**191**	**55**

Percentages

Increase	26%	25%	26%	18%	33%
Decrease	8%	15%	18%	21%	11%
Stay the same	66%	59%	56%	61%	56%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Laboratory Equipment >$2,500

	Industry		Hospital		Government		College/University		Independent/Contract Lab	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	32	10	15	5	16	6	13	7	13	2
11-20%	19	2	0	1	6	3	10	3	1	2
21-30%	13	3	1	0	1	2	2	5	0	0
31-40%	6	1	0	0	0	0	3	1	0	0
41-50%	0	0	0	1	1	0	2	0	0	0
51-60%	1	1	0	0	0	1	1	1	0	0
61-70%	0	0	0	0	0	1	0	2	0	1
71-80%	0	1	0	0	0	0	0	4	0	0
81-90%	0	2	0	1	0	1	0	2	1	1
91-100%	1	1	0	1	0	2	0	7	0	0
>100%	1	0	1	0	0	0	0	0	1	0

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Organization Cross Tabulations

Question 4 (cont'd)

Laboratory Equipment >$2,500

Reasons for Increase in spending	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increased workload/New business/projects	28	4	2	11	6
Increased staff	2	0	2	0	0
Increased budget	6	0	0	5	2
Business/Market changes	1	0	0	0	0
Cost/Inflation	1	1	0	0	2
New labs/Expansion/Need more instruments	8	1	5	7	3
New technology/procedures	8	1	2	0	1
Replacements/Upgrades	18	7	13	6	4
New instruments/Will purchase	3	2	3	3	0
Reasons for Decrease in spending					
Budget/Funds	7	3	13	19	3
Downsizing/Consolidation	5	0	1	1	2
Less work	2	0	1	2	1
Business issues/Economy	3	2	0	1	0
No need/Already purchased	7	5	1	12	0
Replacements	1	0	0	0	0
Reasons for No Change in spending					
No change in budget	67	16	24	33	11
No change in staff	3	0	0	0	0
No change in workload	23	2	3	14	5
Business/Economic issues	9	2	1	2	3
No need/Not budgeted	72	15	19	52	8

Responses

Laboratory Instruments <$5,000	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increase	55	11	18	37	9
Decrease	20	10	22	37	5
Stay the same	235	61	65	118	40
Total	**310**	**82**	**105**	**192**	**54**

Percentages

Increase	18%	13%	17%	19%	17%
Decrease	6%	12%	21%	19%	9%
Stay the same	76%	74%	62%	61%	74%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

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Organization Cross Tabulations

Question 4 (cont'd) **Laboratory Instruments <$5,000**

	Industry		Hospital		Government		College/University		Independent/Contract Lab	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	18	6	9	4	13	6	14	7	8	2
11-20%	19	2	1	1	5	2	8	3	0	0
21-30%	6	3	0	0	0	4	3	2	0	0
31-40%	2	0	0	2	0	1	3	3	1	0
41-50%	0	1	0	1	0	0	1	4	0	0
51-60%	0	0	0	0	0	0	0	0	0	0
61-70%	0	1	0	0	0	1	0	1	0	0
71-80%	0	0	0	0	0	1	0	2	0	0
81-90%	0	2	1	0	0	0	0	1	0	1
91-100%	2	1	0	2	0	2	1	6	0	1
>100%	0	0	0	0	0	0	0	0	0	0

Laboratory Instruments <$5,000

Reasons for Increase in spending	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increased workload/New business/projects	19	3	5	12	3
Increased staff	3	2	2	0	0
Increased budget	0	0	0	2	1
Business/Market changes	0	0	0	0	0
Cost/Inflation	2	0	1	0	0
New labs/Expansion/Need more instruments	6	0	2	8	1
New technology/procedures	3	3	0	0	2
Replacements/Upgrades	16	2	7	12	2
New instruments/Will purchase	4	0	1	2	0
Reasons for Decrease in spending					
Budget/Funds	4	4	14	18	2
Downsizing/Consolidation	6	1	2	1	1
Less work	0	0	0	0	1
Business issues/Economy	1	3	0	1	0
No need/Already purchased	8	1	3	11	1
Replacements	1	0	0	1	0
Reasons for No Change in spending					
No change in budget	78	25	23	29	13
No change in staff	2	0	0	1	0
No change in workload	25	1	2	22	7
Business/Economic issues	9	0	1	2	0
No need/Not budgeted	86	22	23	47	14

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Organization Cross Tabulations

Question 4 (cont'd)

Responses

Laboratory Instruments >$5,000	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increase	95	23	37	36	20
Decrease	34	10	20	38	5
Stay the same	178	49	47	118	29
Total	**307**	**82**	**104**	**192**	**54**

Percentages

Increase	31%	28%	36%	19%	37%
Decrease	11%	12%	19%	20%	9%
Stay the same	58%	60%	45%	61%	54%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Laboratory Instruments >$5,000

	Industry		Hospital		Government		College/University		Independent/Contract Lab	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	31	7	10	3	15	6	11	4	12	1
11-20%	24	6	6	1	10	2	9	3	6	1
21-30%	11	4	2	1	3	0	5	2	0	0
31-40%	2	2	1	2	0	1	3	1	0	0
41-50%	3	3	0	0	0	1	2	2	1	0
51-60%	2	0	0	0	0	0	0	1	0	0
61-70%	1	0	0	1	1	1	1	0	0	0
71-80%	0	3	0	0	1	0	0	6	0	0
81-90%	1	0	0	0	0	0	0	1	0	0
91-100%	2	3	0	1	0	5	0	10	0	2
>100%	4	0	1	0	1	0	1	0	0	0

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Organization Cross Tabulations

Question 4 (cont'd)

Laboratory Instruments >$5,000

Reasons for Increase in spending	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increased workload/New business/projects	32	8	5	8	4
Increased staff	2	0	1	2	0
Increased budget	2	0	0	4	1
Business/Market changes	1	0	0	0	1
Cost/Inflation	1	1	0	0	0
New labs/Expansion/Need more instruments	7	1	6	2	2
New technology/procedures	14	1	2	2	4
Replacements/Upgrades	24	8	19	8	8
New instruments/Will purchase	9	1	4	9	0
Reasons for Decrease in spending					
Budget/Funds	11	5	14	18	3
Downsizing/Consolidation	7	1	1	1	0
Less work	1	1	0	2	0
Business issues/Economy	2	1	0	1	0
No need/Already purchased	10	2	2	10	1
Replacements	2	0	0	0	0
Reasons for No Change in spending					
No change in budget	60	18	15	33	9
No change in staff	2	0	0	2	0
No change in workload	21	3	2	16	5
Business/Economic issues	8	2	0	3	0
No need/Not budgeted	58	17	18	48	11

Responses

Laboratory Furniture	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increase	37	20	7	16	8
Decrease	27	9	20	29	4
Stay the same	243	55	78	148	42
Total	**307**	**84**	**105**	**193**	**54**

Percentages

Increase	12%	24%	7%	8%	15%
Decrease	9%	11%	19%	15%	7%
Stay the same	79%	65%	74%	77%	78%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

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Organization Cross Tabulations

Question 4 (cont'd) — **Laboratory Furniture**

	Industry		Hospital		Government		College/University		Independent/Contract Lab	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	13	10	14	3	4	3	8	2	3	2
11-20%	5	2	2	0	1	3	4	4	2	0
21-30%	5	0	0	2	0	1	1	1	1	0
31-40%	2	1	1	1	0	0	0	0	0	0
41-50%	3	3	2	0	0	2	1	1	0	0
51-60%	0	0	0	0	0	0	0	0	0	0
61-70%	0	0	0	0	0	0	0	0	0	0
71-80%	0	0	0	1	0	2	0	1	0	0
81-90%	1	2	0	0	0	0	0	1	0	0
91-100%	0	3	0	1	0	2	1	10	1	0
>100%	1	0	1	0	2	0	1	0	0	0

Laboratory Furniture

Reasons for Increase in spending	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increased workload/New business/projects	10	4	1	3	0
Increased staff	4	4	1	1	1
Increased budget	0	0	0	1	0
Business/Market changes	0	0	0	0	0
Cost/Inflation	0	0	0	0	0
New labs/Expansion/Need more instruments	12	3	1	5	4
New technology/procedures	1	0	0	0	0
Replacements/Upgrades	9	7	4	4	3
New instruments/Will purchase	0	0	0	0	0
Reasons for Decrease in spending					
Budget/Funds	4	2	9	7	0
Downsizing/Consolidation	6	1	3	1	0
Less work	0	1	0	0	1
Business issues/Economy	0	2	2	1	0
No need/Already purchased	15	3	4	16	1
Replacements	1	0	0	0	0
Reasons for No Change in spending					
No change in budget	59	19	20	33	14
No change in staff	13	3	1	8	1
No change in workload	20	1	2	16	6
Business/Economic issues	7	3	1	1	1
No need/Not budgeted	105	16	36	71	17

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Organization Cross Tabulations

Question 4 (cont'd)

Laboratory Automation	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increase	50	22	17	22	16
Decrease	17	8	13	22	4
Stay the same	241	51	75	150	34
Total	**308**	**81**	**105**	**194**	**54**

Percentages

Increase	16%	27%	16%	11%	30%
Decrease	6%	10%	12%	11%	7%
Stay the same	78%	63%	71%	77%	63%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Laboratory Automation

	Industry		Hospital		Government		College/University		Independent/Contract Lab	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	20	5	12	4	7	3	7	2	6	1
11-20%	9	2	6	0	4	2	6	2	6	0
21-30%	10	0	2	1	3	1	2	0	0	1
31-40%	1	1	0	1	0	0	0	1	0	0
41-50%	2	1	0	1	0	0	0	0	0	0
51-60%	1	0	0	0	0	0	1	1	0	0
61-70%	0	1	0	0	0	1	0	1	0	0
71-80%	0	1	0	0	0	2	1	0	0	0
81-90%	0	1	0	0	0	0	0	1	0	0
91-100%	1	1	0	1	0	1	1	7	0	1
>100%	1	0	1	0	0	0	1	0	0	0

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Question 4 (cont'd)

Laboratory Automation

Reasons for Increase in spending	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increased workload/New business/projects	23	8	5	8	5
Increased staff	0	0	0	0	0
Increased budget	1	0	0	3	2
Business/Market changes	1	1	0	0	1
Cost/Inflation	0	0	1	0	0
New labs/Expansion/Need more instruments	2	2	0	2	0
New technology/procedures	11	3	6	4	5
Replacements/Upgrades	7	4	3	1	3
New instruments/Will purchase	2	2	2	3	0
Reasons for Decrease in spending					
Budget/Funds	3	3	10	7	1
Downsizing/Consolidation	7	1	1	2	0
Less work	0	1	0	2	1
Business issues/Economy	1	2	0	1	1
No need/Already purchased	5	1	0	8	0
Replacements	1	0	0	0	0
Reasons for No Change in spending					
No change in budget	66	14	23	39	11
No change in staff	7	2	1	3	0
No change in workload	25	4	3	19	4
Business/Economic issues	7	1	2	1	0
No need/Not budgeted	99	18	27	68	14

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5. Will the Operating Budget for Non-Capital Equipment for your laboratory increase, decrease or stay the same for fiscal 2014 when compared to 2013? What is the reason for your answer?

Responses

	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increase	80	21	28	37	13
Decrease	32	20	23	34	7
Stay the same	195	43	53	121	34
Total	**307**	**84**	**104**	**192**	**54**

Percentages

Increase	26%	25%	27%	19%	24%
Decrease	10%	24%	22%	18%	13%
Stay the same	64%	51%	51%	63%	63%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

	Industry		Hospital		Government		College/University		Independent/Contract Lab	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	42	8	11	10	15	10	15	5	11	3
11-20%	22	11	5	1	8	5	12	9	1	2
21-30%	4	2	1	0	2	1	4	6	0	0
31-40%	1	1	2	3	0	0	1	4	0	0
41-50%	0	0	0	0	0	1	0	2	0	0
51-60%	1	0	0	0	2	1	0	1	0	2
61-70%	0	0	0	2	0	0	0	0	0	0
71-80%	0	1	0	1	0	0	0	0	0	0
81-90%	0	0	0	0	0	1	0	0	0	0
91-100%	1	2	0	1	0	0	0	3	0	0
>100%	1	0	1	0	0	0	0	0	1	0

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

Question 5 (cont'd)

Reasons for Increase	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increased workload/New business/projects	40	13	13	10	6
Increased staff	8	0	0	2	2
Increased budget	8	0	3	7	0
Business/Market changes	1	0	0	0	0
Cost/Inflation	12	1	6	3	3
New labs/Expansion/Need more instruments	3	1	2	7	1
New technology/procedures	1	1	1	1	0
Replacements/Upgrades	3	4	0	5	1
New instruments/Will purchase	0	0	0	0	0
Reasons for Decrease					
Budget/Funds	14	6	18	24	3
Downsizing/Consolidation	7	4	1	1	1
Less work	3	2	1	2	2
Business issues/Economy	4	5	0	1	1
No need/Already purchased	3	1	1	3	0
Replacements	0	0	0	0	0
Reasons for No Change					
No change in budget	80	19	29	51	19
No change in staff	8	1	1	0	1
No change in workload	30	1	2	16	3
Business/Economic issues	9	5	3	2	0
No need/Not budgeted	40	8	8	35	6

Will the <u>Capital Equipment Budget</u> for your laboratory increase, decrease or stay the same for fiscal 2014 when compared to 2013? What is the reason for your answer?

Responses

	Industry	Hospital	Government	College/University	Independent/Contract Lab
Increase	95	23	32	40	15
Decrease	46	14	25	35	8
Stay the same	166	46	46	118	31
Total	**307**	**83**	**103**	**193**	**54**

Percentages

Increase	31%	28%	31%	21%	28%
Decrease	15%	17%	24%	18%	15%
Stay the same	54%	55%	45%	61%	57%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

Question 5 (cont'd)

	Industry		Hospital		Government		College/University		Independent/Contract Lab	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	34	8	8	6	12	8	11	6	7	2
11-20%	26	11	8	1	8	3	11	6	4	1
21-30%	9	5	4	1	3	2	4	5	0	0
31-40%	1	1	1	1	1	0	2	1	0	0
41-50%	2	2	0	1	2	0	3	4	1	0
51-60%	2	0	0	0	0	1	1	2	0	1
61-70%	1	1	0	1	0	0	0	1	0	0
71-80%	0	2	0	1	0	2	0	0	0	0
81-90%	0	2	0	0	0	1	0	2	0	0
91-100%	0	4	0	1	0	3	1	4	1	2
>100%	7	0	1	0	0	0	1	0	0	0

	Industry	Hospital	Government	College/University	Independent/Contract Lab
Reasons for Increase					
Increased workload/New business/projects	27	7	9	9	1
Increased staff	3	0	1	0	0
Increased budget	8	0	0	5	1
Business/Market changes	2	0	0	0	1
Cost/Inflation	2	1	2	2	0
New labs/Expansion/Need more instruments	9	1	6	7	4
New technology/procedures	10	1	1	2	2
Replacements/Upgrades	23	7	10	8	6
New instruments/Will purchase	7	4	1	3	0
Reasons for Decrease					
Budget/Funds	14	9	18	22	1
Downsizing/Consolidation	6	2	0	2	0
Less work	4	0	1	0	2
Business issues/Economy	6	2	1	3	1
No need/Already purchased	14	1	3	6	3
Replacements	1	0	0	0	0
Reasons for No Change					
No change in budget	63	16	22	47	14
No change in staff	7	0	0	0	0
No change in workload	17	2	1	12	4
Business/Economic issues	10	6	2	2	2
No need/Not budgeted	45	10	10	41	6

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

6. Which of the following best describes your organization?

	Responses				
	Industry	Hospital	Government	College/University	Independent/Contract Lab
Industry	313	0	0	0	0
Hospital	0	84	0	0	0
Government	0	0	105	0	0
College/University	0	0	0	195	0
Independent/Contract Lab	0	0	0	0	56
Other	0	0	0	0	0
Total	**313**	**84**	**105**	**195**	**56**

	Percentages				
Industry	100%	0%	0%	0%	0%
Hospital	0%	100%	0%	0%	0%
Government	0%	0%	100%	0%	0%
College/University	0%	0%	0%	100%	0%
Independent/Contract Lab	0%	0%	0%	0%	100%
Other	0%	0%	0%	0%	0%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

7. Which of the following best describes your department?

	Responses				
	Industry	Hospital	Government	College/University	Independent/Contract Lab
Research	74	22	20	120	6
Development	78	2	2	2	5
Central Service Laboratory	23	57	55	12	24
QA/QC	91	1	12	0	7
Production/Process Control Monitoring	31	0	13	1	3
Management (not lab)	14	1	1	1	9
Purchasing	1	0	0	0	1
Teaching/Education	1	1	1	56	0
Other	0	0	0	0	0
Total	**313**	**84**	**104**	**192**	**55**

	Percentages				
Research	24%	26%	19%	63%	11%
Development	25%	2%	2%	1%	9%
Central Service Laboratory	7%	68%	53%	6%	44%
QA/QC	29%	1%	12%	0%	13%
Production/Process Control Monitoring	10%	0%	13%	1%	5%
Management (not lab)	4%	1%	1%	1%	16%
Purchasing	0%	0%	0%	0%	2%
Teaching/Education	0%	1%	1%	29%	0%
Other	0%	0%	0%	0%	0%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

North American Survey of Laboratory Purchasing Trends - January 2014
Organization Cross Tabulations

8. What types of products/services does your organization provide?

	Responses				
	Industry	Hospital	Government	College/University	Independent/Contract Lab
Agricultural Chemicals	25	0	4	7	9
Automotive/Defense/Aviation	32	0	1	0	0
Basic Research (not product related)	14	20	14	121	1
Bio-Pharmaceuticals	43	0	3	16	5
Biotechnology Products	47	2	3	17	1
Clinical/Diagnostics	30	58	12	20	9
Consumer Products	40	0	2	3	5
Education	6	20	4	114	3
Electronic Instruments/Semiconductors	15	0	0	2	1
Environmental/Water	27	1	54	17	30
Food/Beverages/Flavors	32	0	5	5	9
Forensics/Toxicology	4	11	26	8	1
Homeland Security	4	0	4	3	1
Inorganic Chemicals	31	0	2	8	7
Metals/Metal Products	21	0	3	2	8
Organic Chemicals	42	2	3	18	6
Paper/Pulp	9	0	0	4	2
Petrochemicals	25	0	0	3	4
Petroleum	18	0	0	2	2
Non-Petroleum/Fuels/Energy	14	0	1	5	1
Pharmaceuticals	53	2	1	15	5
Pharmaceuticals Generic/BioGeneric	20	0	0	7	0
Pigments and Dyes	10	0	0	2	1
Polymers/Paints/Coatings	54	0	1	4	2
Recycling	2	0	2	3	0
Renewable Energy	5	0	1	6	1
Service Laboratory	23	27	17	23	22
Other	0	0	0	0	0

Appendix III

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

Basic Research N = 187	Biotechnology N = 83	Chemicals N = 292	Clinical N = 170	Environmental N = 135	Pharmaceutical N = 151

1. Which of the following best describes your laboratory personnel in 2014 as compared to 2013? What is the reason for your answer?

Responses

	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increased	47	24	76	40	34	40
Decreased	58	21	49	49	31	33
Stayed the same	79	34	164	77	65	74
Total	**184**	**79**	**289**	**166**	**130**	**147**

Percentages

Increased	26%	30%	26%	24%	26%	27%
Decreased	32%	27%	17%	30%	24%	22%
Stayed the same	43%	43%	57%	46%	50%	50%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

	Basic Research		Biotechnology		Chemicals		Clinical		Environmental		Pharmaceutical	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	16	18	7	6	32	15	21	25	18	15	16	15
11-20%	15	12	5	3	25	9	8	11	7	7	13	6
21-30%	6	11	4	6	4	12	5	5	3	8	4	5
31-40%	2	4	5	3	8	3	1	3	3	0	3	3
41-50%	2	7	1	1	1	6	1	1	0	0	0	2
51-60%	1	4	0	0	0	0	0	1	0	0	0	0
61-70%	1	0	0	0	0	0	0	0	0	0	0	0
71-80%	0	0	0	0	1	0	1	0	0	0	0	0
81-90%	0	0	0	0	0	1	0	0	0	0	0	0
91-100%	1	0	0	0	1	0	1	2	1	1	0	1
>100%	0	0	1	0	0	0	1	0	0	0	0	0

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

Question 1 (cont'd)

Reasons for Laboratory Personnel Increasing	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Additional personnel	34	16	56	29	25	29
Additional contracts/funding/expansion	9	6	8	5	3	8
Organization/Company changes	0	1	5	3	3	0
Regulatory requirements	0	0	1	0	2	0

Reasons for Laboratory Personnel Decreasing						
Downsizing/Layoffs	12	7	15	10	8	13
Smaller staff/No replacements	14	2	15	17	12	4
Budget cuts/Funding	23	6	9	11	3	8
Economy	1	0	3	2	1	2
Organization/Company changes	3	3	4	2	5	2

Reasons for Laboratory Personnel Staying the Same						
No changes in workload	16	6	44	12	12	11
No changes in budgets/funds/contracts	26	9	40	24	23	23
Organization/Company changes	4	1	4	3	0	4
No need to add/no hiring	16	5	51	24	17	16
Economy	5	5	9	2	6	8

2. Is your organization hiring new people for the laboratory?

Responses

	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Yes, as replacement for people who have left/retired	44	19	74	70	29	34
Yes, increasing the staff	29	16	48	24	13	35
No hiring	103	39	154	59	81	67
No, we have layoffs and/or early retirements	9	7	15	15	9	11
Total	**185**	**81**	**291**	**168**	**132**	**147**

Percentages

Yes, as replacement for people who have left/retired	24%	23%	25%	42%	22%	23%
Yes, increasing the staff	16%	20%	16%	14%	10%	24%
No hiring	56%	48%	53%	35%	61%	46%
No, we have layoffs and/or early retirements	5%	9%	5%	9%	7%	7%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

3. Which of the following best describes your workload in 2014 as compared to 2013?

Responses

	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increased	92	57	172	88	78	91
Decreased	20	9	24	24	11	14
Stayed the same	72	15	92	54	42	43
Total	**184**	**81**	**288**	**166**	**131**	**148**

Percentages

Increased	50%	70%	60%	53%	60%	61%
Decreased	11%	11%	8%	14%	8%	9%
Stayed the same	39%	19%	32%	33%	32%	29%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

	Basic Research		Biotechnology		Chemicals		Clinical		Environmental		Pharmaceutical	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	19	7	10	2	47	6	36	13	22	2	22	1
11-20%	37	4	22	2	70	4	27	6	27	3	41	5
21-30%	15	6	14	3	27	6	16	3	18	1	17	3
31-40%	6	1	3	0	7	3	3	1	1	0	7	1
41-50%	6	0	2	2	6	2	2	0	3	1	3	1
51-60%	2	2	2	0	2	0	0	0	1	1	0	0
61-70%	1	0	0	0	0	1	0	0	0	0	0	0
71-80%	0	0	0	0	1	1	1	0	0	0	0	1
81-90%	0	0	0	0	0	0	0	0	0	0	0	0
91-100%	0	0	0	0	0	0	0	0	0	0	0	1
>100%	2	0	1	0	0	0	1	0	0	0	0	0

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

Question 3 (cont'd)

Reasons for Workload Increasing	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Decrease in personnel/Layoffs	9	3	5	3	5	5
Additional projects/tests/business	41	36	107	50	44	60
Budget cuts	5	2	1	1	0	1
Organization/Company changes	3	4	14	4	7	7
Personnel changes	4	0	4	0	1	0
Regulatory requirements	0	0	4	5	5	1
More productive/Responsibilities/Same staff	25	8	29	14	14	11
Reasons for Workload Decreasing						
Budgets/Funding	12	4	4	3	2	4
Business/Economy	2	1	8	6	2	2
Less work	0	2	8	10	1	2
Organization/Company changes	4	2	2	3	4	4
Reasons for Workload Staying the Same						
No budget changes/cuts	13	1	12	10	4	7
No need/No change in the workload	48	10	58	30	30	23
Organization/Company changes	2	1	6	2	1	6
Economy	3	2	8	4	4	2

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

Questions 1 and 3 (cont'd)

	Responses					
If Workload Has Increased	**Basic Research**	**Biotechnology**	**Chemicals**	**Clinical**	**Environmental**	**Pharmaceutical**
Staff has increased	33	24	67	35	25	37
Staff has decreased	29	8	24	16	19	19
Staff has stayed the same	30	23	80	36	32	33
Total	**92**	**55**	**171**	**87**	**76**	**89**
If Workload Has Decreased						
Staff has increased	0	0	0	0	1	0
Staff has decreased	16	7	11	17	5	10
Staff has stayed the same	4	2	13	7	5	4
Total	**20**	**9**	**24**	**24**	**11**	**14**
If Workload Has Stayed the Same						
Staff has increased	14	0	9	4	8	3
Staff has decreased	12	5	12	14	7	3
Staff has stayed the same	45	9	71	34	27	36
Total	**71**	**14**	**92**	**52**	**42**	**42**
If Workload Has Increased	**Percentages**					
Staff has increased	36%	44%	39%	40%	33%	42%
Staff has decreased	32%	15%	14%	18%	25%	21%
Staff has stayed the same	33%	42%	47%	41%	42%	37%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**
If Workload Has Decreased						
Staff has increased	0%	0%	0%	0%	9%	0%
Staff has decreased	80%	78%	46%	71%	45%	71%
Staff has stayed the same	20%	22%	54%	29%	45%	29%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**
If Workload Has Stayed the Same						
Staff has increased	20%	0%	10%	8%	19%	7%
Staff has decreased	17%	36%	13%	27%	17%	7%
Staff has stayed the same	63%	64%	77%	65%	64%	86%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

4. Will the spending for the following products for your laboratory increase, decrease or stay the same for fiscal 2014 when compared to 2013?

Responses

Chemicals, Reagents, Solvents	**Basic Research**	**Biotechnology**	**Chemicals**	**Clinical**	**Environmental**	**Pharmaceutical**
Increase	66	42	124	70	65	67
Decrease	43	15	35	31	16	25
Stay the same	77	25	130	68	51	57
Total	**186**	**82**	**289**	**169**	**132**	**149**

Percentages

Increase	35%	51%	43%	41%	49%	45%
Decrease	23%	18%	12%	18%	12%	17%
Stay the same	41%	30%	45%	40%	39%	38%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Chemicals, Reagents, Solvents

	Basic Research		**Biotechnology**		**Chemicals**		**Clinical**		**Environmental**		**Pharmaceutical**	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	22	12	13	5	47	8	32	16	28	4	30	9
11-20%	26	11	9	3	43	9	23	4	22	7	15	6
21-30%	11	11	11	4	14	7	9	3	9	2	8	5
31-40%	3	2	4	1	3	3	1	1	4	0	7	2
41-50%	0	1	1	1	0	2	1	1	0	0	0	1
51-60%	0	2	1	0	0	0	0	0	0	0	1	0
61-70%	0	0	0	0	0	1	0	0	0	0	0	1
71-80%	0	0	0	0	1	1	0	2	0	1	0	0
81-90%	0	0	0	0	0	1	0	0	0	0	0	0
91-100%	0	0	1	0	1	0	1	0	0	0	0	1
>100%	1	0	0	0	1	0	1	0	0	0	1	0

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

Question 4 (cont'd)

Chemicals, Reagents, Solvents

Reasons for Increase in spending	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increased workload/New business/projects	37	30	79	33	44	45
Increased staff	2	1	2	2	0	2
Increased budget	6	1	2	2	2	3
Business/Market changes	0	0	1	0	0	0
Cost/Inflation	5	2	15	8	11	6
New labs/Expansion/Need more instruments	4	0	4	7	4	2
New technology/procedures	8	3	11	8	3	4
Replacements/Upgrades	1	1	4	1	1	0
New instruments/Will purchase	0	0	3	1	0	0
Reasons for Decrease in spending						
Budget/Funds	31	12	18	11	6	11
Downsizing/Consolidation	3	0	6	3	2	5
Less work	2	2	5	10	3	4
Business issues/Economy	3	0	2	4	2	4
No need/Already purchased	1	0	2	1	1	0
Replacements	0	0	0	0	0	0
Reasons for No Change in spending						
No change in budget	35	15	54	26	25	22
No change in staff	0	0	7	2	1	2
No change in workload	22	5	34	19	18	20
Business/Economic issues	4	1	6	5	0	4
No need/Not budgeted	9	3	18	8	2	4

Responses

Glassware, Plasticware	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increase	47	31	90	48	42	51
Decrease	35	12	24	21	14	24
Stay the same	103	39	170	101	78	74
Total	**185**	**82**	**284**	**170**	**134**	**149**

Percentages

Increase	25%	38%	32%	28%	31%	34%
Decrease	19%	15%	8%	12%	10%	16%
Stay the same	56%	48%	60%	59%	58%	50%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

Question 4 (cont'd) — **Glassware, Plasticware**

	Basic Research		Biotechnology		Chemicals		Clinical		Environmental		Pharmaceutical	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	24	11	9	2	47	3	22	9	26	3	25	5
11-20%	12	3	13	2	20	4	15	3	8	4	12	6
21-30%	5	10	3	4	6	5	3	2	5	2	5	3
31-40%	4	2	1	1	3	3	2	1	1	0	2	2
41-50%	0	2	0	1	0	1	2	2	0	0	0	1
51-60%	0	4	1	0	0	1	0	1	0	1	1	2
61-70%	0	0	0	0	1	0	0	0	0	0	0	0
71-80%	0	0	0	0	1	1	1	1	0	1	0	0
81-90%	0	0	0	0	0	0	0	0	0	0	0	0
91-100%	0	0	1	0	1	1	1	0	0	0	0	1
>100%	0	0	0	0	0	0	0	0	0	0	0	0

Glassware, Plasticware

Reasons for Increase in spending	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increased workload/New business/projects	30	20	48	28	19	31
Increased staff	3	5	5	4	2	6
Increased budget	1	0	2	0	0	0
Business/Market changes	0	0	0	0	1	0
Cost/Inflation	3	2	10	2	6	5
New labs/Expansion/Need more instruments	4	0	5	3	4	1
New technology/procedures	3	1	3	3	1	1
Replacements/Upgrades	2	1	10	1	7	4
New instruments/Will purchase	0	0	3	0	0	0
Reasons for Decrease in spending						
Budget/Funds	21	7	8	6	5	7
Downsizing/Consolidation	2	0	3	2	2	5
Less work	0	1	2	6	2	2
Business issues/Economy	1	1	3	1	1	3
No need/Already purchased	8	2	5	4	1	6
Replacements	1	0	1	1	0	0
Reasons for No Change in spending						
No change in budget	41	17	64	35	29	25
No change in staff	1	1	6	3	0	3
No change in workload	23	6	42	23	24	17
Business/Economic issues	3	1	2	0	1	5
No need/Not budgeted	22	10	41	27	14	16

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

Question 4 (cont'd)

Consumables Excluding Chemicals	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
	Responses					
Increase	49	33	113	56	58	57
Decrease	29	12	25	20	15	16
Stay the same	106	36	152	94	58	73
Total	**184**	**81**	**290**	**170**	**131**	**146**
	Percentages					
Increase	27%	41%	39%	33%	44%	39%
Decrease	16%	15%	9%	12%	11%	11%
Stay the same	58%	44%	52%	55%	44%	50%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Consumables Excluding Chemicals

	Basic Research		Biotechnology		Chemicals		Clinical		Environmental		Pharmaceutical	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	18	7	14	3	57	2	33	6	30	4	23	3
11-20%	14	2	5	3	24	9	15	4	15	6	14	4
21-30%	10	9	5	2	11	2	4	1	9	0	5	2
31-40%	1	6	3	3	1	4	0	2	0	0	6	3
41-50%	1	1	0	1	1	3	1	1	1	0	1	1
51-60%	0	1	1	0	1	0	0	0	0	0	1	0
61-70%	0	0	0	0	0	0	0	0	0	0	0	0
71-80%	0	0	0	0	0	0	1	2	0	1	0	0
81-90%	0	0	0	0	0	1	0	0	0	0	0	0
91-100%	0	0	1	0	1	0	1	0	0	0	0	1
>100%	0	0	0	0	0	0	0	0	0	0	0	0

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

Question 4 (cont'd)

Consumables excluding chemicals

Reasons for Increase in spending	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increased workload/New business/projects	31	25	74	33	37	39
Increased staff	3	2	4	4	1	5
Increased budget	1	1	3	1	0	1
Business/Market changes	0	0	0	0	1	0
Cost/Inflation	3	1	12	3	8	2
New labs/Expansion/Need more instruments	4	0	4	2	2	1
New technology/procedures	4	1	4	5	3	2
Replacements/Upgrades	2	1	5	0	2	2
New instruments/Will purchase	0	0	3	2	1	1
Reasons for Decrease in spending						
Budget/Funds	21	9	10	6	4	5
Downsizing/Consolidation	2	0	3	3	2	5
Less work	0	0	5	5	3	2
Business issues/Economy	2	1	2	2	2	2
No need/Already purchased	2	1	2	2	0	1
Replacements	0	0	1	1	0	0
Reasons for No Change in spending						
No change in budget	37	14	51	29	24	24
No change in staff	2	1	6	4	0	1
No change in workload	33	6	40	24	22	21
Business/Economic issues	2	2	3	2	0	4
No need/Not budgeted	20	10	34	19	6	14

Responses

Laboratory Equipment <$2,500	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increase	40	28	71	41	36	34
Decrease	44	15	30	24	18	22
Stay the same	100	39	188	105	81	94
Total	**184**	**82**	**289**	**170**	**135**	**150**

Percentages

Increase	22%	34%	25%	24%	27%	23%
Decrease	24%	18%	10%	14%	13%	15%
Stay the same	54%	48%	65%	62%	60%	63%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

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Products/Services Cross Tabulations

Question 4 (cont'd) **Laboratory Equipment <$2,500**

	Basic Research		Biotechnology		Chemicals		Clinical		Environmental		Pharmaceutical	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	16	6	8	2	28	5	20	4	21	5	14	5
11-20%	16	7	14	4	29	5	14	6	10	6	13	4
21-30%	1	8	2	3	4	3	2	2	0	0	5	2
31-40%	0	1	0	1	1	2	0	1	0	1	0	1
41-50%	2	2	1	0	1	4	0	2	0	1	0	1
51-60%	1	1	0	0	1	1	0	1	0	0	1	0
61-70%	0	2	0	1	0	0	0	0	0	0	0	1
71-80%	0	6	1	2	0	2	1	2	0	0	1	2
81-90%	0	0	0	1	0	2	0	1	0	1	0	2
91-100%	0	1	0	0	1	1	0	3	0	0	0	1
>100%	0	0	1	0	1	0	1	0	0	0	0	0

Laboratory Equipment <$2,500

	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Reasons for Increase in spending						
Increased workload/New business/projects	16	18	22	11	11	18
Increased staff	1	2	3	2	1	5
Increased budget	2	1	5	0	1	0
Business/Market changes	0	0	0	0	0	0
Cost/Inflation	0	0	2	0	3	0
New labs/Expansion/Need more instruments	4	0	6	2	2	1
New technology/procedures	3	2	5	3	1	4
Replacements/Upgrades	9	4	22	20	16	4
New instruments/Will purchase	2	0	3	0	1	0
Reasons for Decrease in spending						
Budget/Funds	19	7	11	7	6	4
Downsizing/Consolidation	3	0	4	3	4	4
Less work	0	0	3	2	0	2
Business issues/Economy	2	2	3	1	2	4
No need/Already purchased	17	4	6	6	3	5
Replacements	0	1	2	2	1	2
Reasons for No Change in spending						
No change in budget	34	16	72	35	29	34
No change in staff	0	2	4	2	1	2
No change in workload	15	2	25	13	11	16
Business/Economic issues	3	1	5	4	0	5
No need/Not budgeted	35	11	63	34	27	26

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

Question 4 (cont'd)

Laboratory Equipment >$2,500	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
	Responses					
Increase	36	33	76	43	39	46
Decrease	38	14	26	24	18	23
Stay the same	109	34	187	97	77	79
Total	**183**	**81**	**289**	**164**	**134**	**148**
	Percentages					
Increase	20%	41%	26%	26%	29%	31%
Decrease	21%	17%	9%	15%	13%	16%
Stay the same	60%	42%	65%	59%	57%	53%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Laboratory Equipment >$2,500

	Basic Research		Biotechnology		Chemicals		Clinical		Environmental		Pharmaceutical	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	15	7	10	3	34	7	26	9	22	7	18	6
11-20%	10	3	10	2	21	2	7	2	9	0	9	4
21-30%	4	5	5	2	7	4	4	2	0	3	8	3
31-40%	1	1	2	0	3	1	0	0	1	0	3	0
41-50%	1	0	0	0	1	0	1	0	1	0	1	0
51-60%	1	1	1	0	1	0	0	0	1	1	0	0
61-70%	0	3	0	2	0	2	0	0	0	2	0	2
71-80%	0	4	0	1	0	0	0	1	0	0	0	1
81-90%	0	2	0	0	0	2	0	2	0	0	0	1
91-100%	0	3	0	3	1	6	0	2	0	2	0	3
>100%	0	0	2	0	1	0	2	0	0	0	1	0

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Products/Services Cross Tabulations

Question 4 (cont'd)

Laboratory Equipment >$2,500

Reasons for Increase in spending	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increased workload/New business/projects	13	21	25	10	12	25
Increased staff	1	2	1	2	1	2
Increased budget	5	2	9	0	2	1
Business/Market changes	0	0	1	0	0	0
Cost/Inflation	0	0	1	1	2	0
New labs/Expansion/Need more instruments	5	0	8	3	4	5
New technology/procedures	1	1	7	2	3	3
Replacements/Upgrades	6	3	17	14	13	5
New instruments/Will purchase	3	1	4	5	2	1
Reasons for Decrease in spending						
Budget/Funds	20	6	8	7	6	4
Downsizing/Consolidation	2	1	3	2	2	5
Less work	0	1	2	2	1	2
Business issues/Economy	2	2	5	2	2	4
No need/Already purchased	12	2	5	7	3	5
Replacements	0	0	0	0	0	1
Reasons for No Change in spending						
No change in budget	29	17	62	33	32	34
No change in staff	0	0	2	1	0	0
No change in workload	13	3	24	11	8	15
Business/Economic issues	3	3	6	4	1	3
No need/Not budgeted	49	7	66	33	20	21

Responses

Laboratory Instruments <$5,000	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increase	27	18	55	27	24	30
Decrease	39	12	29	19	19	20
Stay the same	117	51	204	121	89	98
Total	**183**	**81**	**288**	**167**	**132**	**148**

Percentages

Increase	15%	22%	19%	16%	18%	20%
Decrease	21%	15%	10%	11%	14%	14%
Stay the same	64%	63%	71%	72%	67%	66%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

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Products/Services Cross Tabulations

Question 4 (cont'd) **Laboratory Instruments <$5,000**

	Basic Research		Biotechnology		Chemicals		Clinical		Environmental		Pharmaceutical	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	11	10	6	3	24	5	14	5	13	4	10	5
11-20%	8	3	6	0	15	3	10	2	5	1	11	2
21-30%	1	3	3	0	5	4	1	1	2	3	3	1
31-40%	0	3	0	0	2	1	1	3	0	1	1	0
41-50%	0	3	0	1	0	3	0	0	0	0	0	2
51-60%	0	1	0	1	0	1	0	0	0	0	0	1
61-70%	0	1	0	0	0	2	0	0	0	1	0	1
71-80%	0	3	0	1	0	1	0	2	0	0	0	1
81-90%	0	0	0	0	0	2	1	1	0	0	0	1
91-100%	1	3	0	2	1	3	0	2	0	4	1	2
>100%	0	0	0	0	0	0	0	0	0	0	0	0

Laboratory Instruments <$5,000

Reasons for Increase in spending	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increased workload/New business/projects	12	12	16	8	6	13
Increased staff	0	1	3	4	1	2
Increased budget	1	1	2	0	0	0
Business/Market changes	0	0	0	0	0	0
Cost/Inflation	0	0	2	0	1	0
New labs/Expansion/Need more instruments	4	1	9	1	3	4
New technology/procedures	1	1	3	4	1	3
Replacements/Upgrades	7	0	16	6	11	7
New instruments/Will purchase	1	1	2	1	1	1
Reasons for Decrease in spending						
Budget/Funds	21	5	10	7	6	2
Downsizing/Consolidation	1	0	5	2	3	3
Less work	0	0	0	1	0	1
Business issues/Economy	1	1	3	2	1	3
No need/Already purchased	13	4	8	4	4	8
Replacements	0	0	0	0	1	1
Reasons for No Change in spending						
No change in budget	29	20	69	47	28	37
No change in staff	1	0	2	0	0	0
No change in workload	17	3	24	9	9	14
Business/Economic issues	2	2	5	1	1	3
No need/Not budgeted	50	18	74	46	27	31

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

Question 4 (cont'd)

Responses

Laboratory Instruments >$5,000	**Basic Research**	**Biotechnology**	**Chemicals**	**Clinical**	**Environmental**	**Pharmaceutical**
Increase	35	27	93	55	50	46
Decrease	37	14	35	19	18	26
Stay the same	114	39	157	93	63	76
Total	**186**	**80**	**285**	**167**	**131**	**148**

Percentages

Increase	19%	34%	33%	33%	38%	31%
Decrease	20%	18%	12%	11%	14%	18%
Stay the same	61%	49%	55%	56%	48%	51%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Laboratory Instruments >$5,000

	Basic Research		**Biotechnology**		**Chemicals**		**Clinical**		**Environmental**		**Pharmaceutical**	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	16	6	11	4	30	3	28	4	17	3	21	6
11-20%	7	2	5	1	23	4	14	4	16	1	13	7
21-30%	5	2	4	0	8	3	5	1	3	0	3	0
31-40%	0	2	1	0	4	2	1	3	1	0	3	2
41-50%	2	2	0	0	4	3	0	1	2	1	0	3
51-60%	0	2	0	1	2	1	0	0	1	0	0	1
61-70%	0	1	0	0	1	0	1	0	0	0	1	0
71-80%	0	6	0	1	0	4	0	0	0	0	0	1
81-90%	0	0	1	0	0	0	0	0	0	0	0	0
91-100%	0	6	0	4	1	8	0	4	0	7	0	3
>100%	1	0	1	0	3	0	1	0	2	0	2	0

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Products/Services Cross Tabulations

Question 4 (cont'd)

Laboratory Instruments >$5,000

Reasons for Increase in spending	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increased workload/New business/projects	9	15	28	15	13	20
Increased staff	2	1	2	2	1	3
Increased budget	3	1	3	2	0	0
Business/Market changes	0	0	2	0	1	0
Cost/Inflation	0	0	1	1	0	0
New labs/Expansion/Need more instruments	2	1	8	1	6	4
New technology/procedures	3	3	12	5	5	7
Replacements/Upgrades	7	2	27	17	20	6
New instruments/Will purchase	7	2	9	9	4	4
Reasons for Decrease in spending						
Budget/Funds	22	5	13	9	7	7
Downsizing/Consolidation	1	2	4	2	1	4
Less work	1	0	2	1	0	3
Business issues/Economy	1	0	3	2	2	2
No need/Already purchased	10	5	10	4	4	6
Replacements	0	0	0	0	0	2
Reasons for No Change in spending						
No change in budget	34	18	51	34	18	28
No change in staff	3	0	2	0	0	0
No change in workload	15	1	21	10	7	11
Business/Economic issues	2	2	5	3	0	3
No need/Not budgeted	44	14	55	30	20	24

Responses

Laboratory Furniture	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increase	17	13	38	24	19	22
Decrease	32	10	34	17	16	22
Stay the same	135	56	215	127	97	105
Total	**184**	**79**	**287**	**168**	**132**	**149**

Percentages

Increase	9%	16%	13%	14%	14%	15%
Decrease	17%	13%	12%	10%	12%	15%
Stay the same	73%	71%	75%	76%	73%	70%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

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Products/Services Cross Tabulations

Question 4 (cont'd) — **Laboratory Furniture**

	Basic Research		Biotechnology		Chemicals		Clinical		Environmental		Pharmaceutical	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	8	5	6	3	15	8	18	6	8	4	9	7
11-20%	6	3	4	1	6	4	3	2	4	1	5	1
21-30%	1	2	0	0	4	0	0	2	2	0	2	0
31-40%	0	0	1	0	2	0	1	1	0	0	1	1
41-50%	1	1	1	0	3	3	0	1	1	2	3	1
51-60%	0	0	0	0	0	0	0	0	0	0	0	0
61-70%	0	0	0	0	0	0	0	0	0	0	0	0
71-80%	0	3	0	0	0	0	0	0	0	0	0	0
81-90%	0	1	0	1	0	3	0	0	0	0	1	1
91-100%	0	5	0	2	0	8	0	1	0	4	0	6
>100%	1	0	0	0	0	0	2	0	2	0	1	0

Laboratory Furniture

Reasons for Increase in spending	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increased workload/New business/projects	3	7	8	6	5	11
Increased staff	3	1	7	3	3	4
Increased budget	1	0	0	0	0	0
Business/Market changes	0	0	0	0	0	0
Cost/Inflation	0	0	0	0	0	0
New labs/Expansion/Need more instruments	5	1	9	2	2	7
New technology/procedures	0	0	1	0	0	0
Replacements/Upgrades	4	3	12	9	9	0
New instruments/Will purchase	0	0	0	0	0	0
Reasons for Decrease in spending						
Budget/Funds	11	1	6	2	3	1
Downsizing/Consolidation	3	1	6	5	3	4
Less work	0	0	0	2	0	0
Business issues/Economy	0	0	2	1	2	1
No need/Already purchased	16	7	17	7	3	13
Replacements	0	0	0	0	0	1
Reasons for No Change in spending						
No change in budget	29	17	57	36	26	27
No change in staff	9	4	7	5	3	5
No change in workload	14	1	21	8	11	10
Business/Economic issues	4	1	7	5	1	4
No need/Not budgeted	59	23	93	52	37	40

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Products/Services Cross Tabulations

Question 4 (cont'd)

Responses

Laboratory Automation	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increase	21	15	51	44	24	26
Decrease	25	10	23	10	13	19
Stay the same	138	57	212	114	95	105
Total	**184**	**82**	**286**	**168**	**132**	**150**

Percentages

Increase	11%	18%	18%	26%	18%	17%
Decrease	14%	12%	8%	6%	10%	13%
Stay the same	75%	70%	74%	68%	72%	70%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Laboratory Automation

	Basic Research		Biotechnology		Chemicals		Clinical		Environmental		Pharmaceutical	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	8	6	4	3	24	5	19	5	11	2	10	4
11-20%	7	2	2	2	11	3	10	1	9	1	8	1
21-30%	3	0	3	0	6	0	5	2	0	2	3	0
31-40%	0	1	1	0	1	0	1	1	0	0	1	1
41-50%	0	0	2	0	0	0	0	0	0	0	0	1
51-60%	1	0	0	0	1	1	1	0	0	0	1	1
61-70%	0	1	0	0	0	1	0	0	0	1	0	2
71-80%	0	2	0	2	0	3	1	0	0	1	1	1
81-90%	0	1	0	0	0	1	0	0	0	0	0	1
91-100%	0	5	0	2	1	5	1	1	0	3	0	3
>100%	0	0	0	0	1	0	2	0	0	0	0	0

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Products/Services Cross Tabulations

Question 4 (cont'd)

Laboratory Automation

	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Reasons for Increase in spending						
Increased workload/New business/projects	8	8	24	16	11	13
Increased staff	0	1	1	0	0	1
Increased budget	2	0	1	1	0	1
Business/Market changes	0	1	3	1	1	1
Cost/Inflation	0	0	0	0	0	0
New labs/Expansion/Need more instruments	2	1	1	1	0	1
New technology/procedures	5	1	11	10	6	4
Replacements/Upgrades	1	1	6	8	3	3
New instruments/Will purchase	2	1	1	3	3	2
Reasons for Decrease in spending						
Budget/Funds	10	2	5	2	4	2
Downsizing/Consolidation	2	1	6	4	2	7
Less work	2	0	0	2	0	0
Business issues/Economy	1	2	3	2	3	2
No need/Already purchased	9	4	6	0	0	6
Replacements	0	0	0	0	0	1
Reasons for No Change in spending						
No change in budget	32	17	54	32	29	30
No change in staff	5	3	7	1	1	0
No change in workload	18	1	22	12	9	14
Business/Economic issues	2	1	5	2	2	3
No need/Not budgeted	59	25	96	46	31	40

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5. Will the Operating Budget for Non-Capital Equipment for your laboratory increase, decrease or stay the same for fiscal 2014 when compared to 2013? What is the reason for your answer?

Responses

	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increase	41	24	77	41	33	45
Decrease	38	13	34	34	21	25
Stay the same	107	43	176	94	75	77
Total	**186**	**80**	**287**	**169**	**129**	**147**

Percentages

Increase	22%	30%	27%	24%	26%	31%
Decrease	20%	16%	12%	20%	16%	17%
Stay the same	58%	54%	61%	56%	58%	52%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

	Basic Research		Biotechnology		Chemicals		Clinical		Environmental		Pharmaceutical	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	20	11	7	1	45	6	21	15	19	7	22	6
11-20%	12	7	9	5	16	10	12	6	10	5	14	7
21-30%	3	4	3	1	2	5	2	1	1	3	2	3
31-40%	1	4	1	1	1	2	1	2	0	1	0	2
41-50%	0	0	0	0	0	1	0	0	0	1	0	1
51-60%	0	2	1	0	2	1	0	1	2	0	1	0
61-70%	0	0	0	0	0	0	0	1	0	0	0	0
71-80%	0	0	0	1	0	0	0	1	0	0	0	1
81-90%	0	2	0	1	0	1	0	0	0	0	0	1
91-100%	0	2	0	1	1	2	0	1	0	0	0	1
>100%	0	0	1	0	1	0	2	0	0	0	0	0

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Products/Services Cross Tabulations

Question 5 (cont'd)

Reasons for Increase	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increased workload/New business/projects	16	16	37	20	14	24
Increased staff	2	1	9	1	3	3
Increased budget	5	3	5	4	1	5
Business/Market changes	0	0	2	0	1	1
Cost/Inflation	3	1	13	6	6	7
New labs/Expansion/Need more instruments	4	1	5	1	2	1
New technology/procedures	3	1	0	2	1	0
Replacements/Upgrades	7	0	2	3	2	2
New instruments/Will purchase	0	0	0	0	0	0
Reasons for Decrease						
Budget/Funds	27	9	16	20	11	11
Downsizing/Consolidation	2	0	4	2	1	5
Less work	0	0	3	3	2	2
Business issues/Economy	5	2	3	3	2	3
No need/Already purchased	4	0	5	2	3	2
Replacements	0	0	0	0	0	0
Reasons for No Change						
No change in budget	44	24	77	42	39	37
No change in staff	1	1	6	3	0	1
No change in workload	14	4	24	9	8	14
Business/Economic issues	4	2	7	8	1	3
No need/Not budgeted	30	6	40	19	14	13

Will the <u>Capital Equipment Budget</u> for your laboratory increase, decrease or stay the same for fiscal 2014 when compared to 2013? What is the reason for your answer?

Responses

	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increase	38	27	94	52	42	47
Decrease	39	13	46	31	28	30
Stay the same	107	40	147	85	61	71
Total	**184**	**80**	**287**	**168**	**131**	**148**

Percentages

Increase	21%	34%	33%	31%	32%	32%
Decrease	21%	16%	16%	18%	21%	20%
Stay the same	58%	50%	51%	51%	47%	48%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

Question 5 (cont'd)

	Basic Research		Biotechnology		Chemicals		Clinical		Environmental		Pharmaceutical	
	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease	Increase	Decrease
1-10%	13	8	6	3	32	3	19	9	13	5	19	6
11-20%	9	8	10	2	22	11	20	6	11	3	12	8
21-30%	5	5	6	0	8	3	6	4	3	2	4	3
31-40%	1	1	2	1	3	2	2	2	0	1	2	1
41-50%	2	2	0	0	4	3	1	1	4	1	1	2
51-60%	1	2	0	0	2	2	0	0	1	1	0	0
61-70%	0	2	0	1	1	2	0	0	0	0	0	1
71-80%	0	1	0	1	0	2	0	3	0	1	0	1
81-90%	0	2	0	3	0	3	0	0	0	1	0	3
91-100%	1	3	1	1	0	6	1	2	0	5	0	2
>100%	1	0	1	0	5	0	1	0	0	0	3	0

Reasons for Increase	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Increased workload/New business/projects	13	17	24	19	10	20
Increased staff	0	0	1	1	0	2
Increased budget	4	3	7	1	0	4
Business/Market changes	0	0	3	0	1	0
Cost/Inflation	1	1	3	3	2	1
New labs/Expansion/Need more instruments	4	1	11	4	9	3
New technology/procedures	5	4	10	4	3	6
Replacements/Upgrades	8	0	25	10	14	6
New instruments/Will purchase	2	0	6	5	1	3
Reasons for Decrease						
Budget/Funds	22	8	16	20	11	12
Downsizing/Consolidation	4	1	4	2	0	5
Less work	0	0	3	1	1	2
Business issues/Economy	6	1	8	3	3	4
No need/Already purchased	7	1	11	4	10	4
Replacements	0	0	0	0	0	1
Reasons for No Change						
No change in budget	44	21	53	36	25	26
No change in staff	0	1	5	0	0	1
No change in workload	11	3	16	7	6	11
Business/Economic issues	2	2	11	6	1	2
No need/Not budgeted	35	9	44	21	14	19

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

6. Which of the following best describes your organization?

Responses

	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Industry	14	47	197	31	27	85
Hospital	20	2	2	60	1	2
Government	14	3	19	35	54	3
College/University	121	17	33	27	17	25
Independent/Contract Lab	1	1	25	9	30	8
Contract Research Organization/CRO	5	7	7	2	4	12
Contract Manufacturing Organization/CMO	2	4	7	0	0	9
Foundation/Non-Profit Organization	10	2	2	5	2	7
Other	0	0	0	0	0	0
Total	**187**	**83**	**292**	**169**	**135**	**151**

Percentages

Industry	7%	57%	67%	18%	20%	56%
Hospital	11%	2%	1%	36%	1%	1%
Government	7%	4%	7%	21%	40%	2%
College/University	65%	20%	11%	16%	13%	17%
Independent/Contract Lab	1%	1%	9%	5%	22%	5%
Contract Research Organization/CRO	3%	8%	2%	1%	3%	8%
Contract Manufacturing Organization/CMO	1%	5%	2%	0%	0%	6%
Foundation/Non-Profit Organization	5%	2%	1%	3%	1%	5%
Other	0%	0%	0%	0%	0%	0%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

7. Which of the following best describes your department?

Responses

	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Research	134	31	68	46	18	65
Development	6	15	49	12	6	25
Central Service Laboratory	12	7	40	88	50	13
QA/QC	2	13	78	8	19	27
Production/Process Control Monitoring	1	1	29	4	20	4
Management (not lab)	3	6	14	5	12	6
Purchasing	2	3	3	0	2	2
Teaching/Education	25	6	9	6	8	9
Other	0	0	0	0	0	0
Total	**185**	**82**	**290**	**169**	**135**	**151**

Percentages

Research	72%	38%	23%	27%	13%	43%
Development	3%	18%	17%	7%	4%	17%
Central Service Laboratory	6%	9%	14%	52%	37%	9%
QA/QC	1%	16%	27%	5%	14%	18%
Production/Process Control Monitoring	1%	1%	10%	2%	15%	3%
Management (not lab)	2%	7%	5%	3%	9%	4%
Purchasing	1%	4%	1%	0%	1%	1%
Teaching/Education	14%	7%	3%	4%	6%	6%
Other	0%	0%	0%	0%	0%	0%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

North American Survey of Laboratory Purchasing Trends - January 2014
Products/Services Cross Tabulations

8. What types of products/services does your organization provide?

	Responses					
	Basic Research	Biotechnology	Chemicals	Clinical	Environmental	Pharmaceutical
Agricultural Chemicals	8	8	50	4	19	11
Automotive/Defense/Aviation	4	5	37	2	5	3
Basic Research (not product related)	187	18	36	38	12	30
Bio-Pharmaceuticals	20	31	28	17	14	81
Biotechnology Products	18	83	37	23	16	38
Clinical/Diagnostics	32	22	16	137	12	20
Consumer Products	4	12	55	7	16	14
Education	79	13	29	40	18	21
Electronic Instruments/Semiconductors	1	2	13	2	6	3
Environmental/Water	12	16	62	20	135	20
Food/Beverages/Flavors	9	11	56	9	18	12
Forensics/Toxicology	11	7	17	51	15	7
Homeland Security	3	5	8	7	5	2
Inorganic Chemicals	9	7	51	5	17	14
Metals/Metal Products	0	3	36	1	19	9
Organic Chemicals	19	15	76	8	19	24
Paper/Pulp	4	2	16	0	7	3
Petrochemicals	3	3	35	0	8	7
Petroleum	4	3	25	1	9	6
Non-Petroleum/Fuels/Energy	6	2	24	0	11	6
Pharmaceuticals	18	20	35	13	15	99
Pharmaceuticals Generic/BioGeneric	10	13	18	6	9	36
Pigments and Dyes	1	3	17	1	4	6
Polymers/Paints/Coatings	11	9	67	2	7	14
Recycling	2	1	7	1	5	0
Renewable Energy	4	2	14	2	7	2
Service Laboratory	22	15	42	32	36	20
Other	0	0	0	0	0	0

Appendix IV

Laboratory Products Association

2014 North American Survey of Laboratory Purchasing Trends

Enter to Win an iPad Mini!

The Laboratory Products Association surveys scientists working in the laboratory on a yearly basis to understand the dynamics of the laboratory products market. Their members (manufacturers of products you use in the lab) need to understand the market more fully.

This survey is completely confidential. No sales representative will contact you. Please complete this survey by January 10, 2014 to be entered in the drawing. Thank you for your help.

1. Which of the following best describes your **laboratory personnel** in 2014 as compared to 2013?
What is the reason for your answer?

- ☐ Increased - Select One -
- ☐ Decreased - Select One -
- ☐ Stayed the same - Select One -

What was the percentage of change?
- Select One -

2. Is your organization hiring new people for the laboratory?

- ☐ Yes, as replacement for people who have left/retired
- ☐ Yes, increasing the staff
- ☐ No hiring
- ☐ No, we have layoffs and/or early retirements

Laboratory Workload

3. Which of the following best describes your **workload** in 2014 as compared to 2013? What is the reason for your answer?

- ☐ Increased - Select One -
- ☐ Decreased - Select One -
- ☐ Stayed the same - Select One -

What was the percentage of change?
- Select One -

Spending for Laboratory Products

4. Will the spending for the following products for your laboratory increase, decrease or stay the same for fiscal 2014 when compared to 2013? What is the reason for your answer?

Chemicals, Reagents, Solvents : general purpose, high purity, routine chemicals, etc.

- ☐ Increase - Select One -
- ☐ Decrease - Select One -
- ☐ Stay the same - Select One -

What percentage of change?
- Select One -

Glassware, Plasticware : cylinders, tubes, flasks, beakers, dishes, pipettes, plates, etc.

- ☐ Increase - Select One -
- ☐ Decrease - Select One -
- ☐ Stayed the same - Select One -

What percentage of change?
- Select One -

Consumables excluding chemicals : filtration membranes/apparatus, pipettors/tips, gloves, burners, racks, timers, electrodes, etc.

- ☐ Increase - Select One -
- ☐ Decrease - Select One -
- ☐ Stayed the same - Select One -

What percentage of change?
- Select One -

Laboratory Equipment <$2,500 : ovens, freezers, baths, centrifuges, pumps, shakers, hot plates, etc.

- ☐ Increase - Select One -
- ☐ Decrease - Select One -
- ☐ Stay the same - Select One -

What percentage of change?
- Select One -

Laboratory Equipment >$2,500 : ovens, freezers, baths, centrifuges, pumps, fume hoods,
biological safety cabinets, etc.

- ☐ Increase - Select One -
- ☐ Decrease - Select One -
- ☐ Stayed the same - Select One -

What percentage of change?
- Select One -

Laboratory Instruments <$5,000 : pH/ion meters, thermal cyclers, balances, spectrophotometers, titrators, etc.

- ☐ Increase - Select One -
- ☐ Decrease - Select One -
- ☐ Stayed the same - Select One -

What percentage of change?
- Select One -

Laboratory Instruments >$5,000 : Other measurement instruments including analytical instruments.

- ☐ Increase - Select One -
- ☐ Decrease - Select One -
- ☐ Stayed the same - Select One -

What percentage of change?
- Select One -

Laboratory Furniture : cabinets, benches, counters, tables, chairs, carts, desks, etc.

- ☐ Increase - Select One -
- ☐ Decrease - Select One -
- ☐ Stayed the same - Select One -

What percentage of change?
- Select One -

Laboratory Automation: products to increase productivity and reduce cycle times.

- ☐ Increase - Select One -
- ☐ Decrease - Select One -
- ☐ Stayed the same - Select One -

What percentage of change?
- Select One -

Capital and Non-Capital Equipment

5. Will the **Operating Budget for Non-Capital Equipment** for your laboratory increase, decrease or stay the same for fiscal 2014 when compared to 2013? What is the reason for your answer?

- ☐ Increase - Select One -
- ☐ Decrease - Select One -
- ☐ Stay the same - Select One -

What percentage of change?
- Select One -

Will the **Capital Equipment Budget** for your laboratory increase, decrease or stay the same for fiscal 2014 when compared to 2013? What is the reason for your answer?

- ☐ Increase - Select One -
- ☐ Decrease - Select One -
- ☐ Stay the same - Select One -

What percentage of change?
- Select One -

ABOUT YOU

6. Which of the following best describes your organization? Mark only one.

- ☐ Industry
- ☐ Hospital
- ☐ Government
- ☐ College/University
- ☐ Independent/Contract Lab
- ☐ Contract Research Organization/CRO
- ☐ Contract Manufacturing Organization/CMO
- ☐ Foundation/Non-Profit Organization
- ☐ Other (specify) _____

7. Which of the following best describes your department? Mark only one.

- ☐ Research
- ☐ Development
- ☐ Central Service Laboratory
- ☐ QA/QC
- ☐ Production/Process Control Monitoring
- ☐ Management (not lab)
- ☐ Purchasing
- ☐ Teaching/Education
- ☐ Other (specify) _____

8. What types of products/services does your organization provide? Mark all that apply.

Agricultural Chemicals	☐
Automotive/Defense/Aviation	☐
Basic Research (not product related)	☐
Bio-Pharmaceuticals	☐
Biotechnology Products	☐
Clinical/Diagnostics	☐
Consumer Products	☐
Education	☐
Electronic Instruments/Semiconductors	☐
Environmental/Water	☐
Food/Beverages/Flavors	☐
Forensics/Toxicology	☐
Homeland Security	☐
Inorganic Chemicals	☐

Metals/Metal Products	☐
Organic Chemicals	☐
Paper/Pulp	☐
Petrochemicals	☐
Petroleum	☐
Non-Petroleum/Fuels/Energy	☐
Pharmaceuticals	☐
Pharmaceuticals Generic/BioGeneric	☐
Pigments and Dyes	☐
Polymers/Paints/Coatings	☐
Recycling	☐
Renewable Energy	☐
Service Laboratory	☐
Other (specify)	☐

To be entered in the drawing for an iPad mini, please complete the following information.

First Name	
Last Name	
Organization	
Address	
City	
State	
Zipcode	
Country	
Phone Number	
e-Mail	

Thank you for your input.

Submit