Lab Purchasing Report 2018

An insight into what the industry is buying, who’s involved, and the influence of the end user on lab purchases.
To find out how labs purchase products and whether they differ from other Business to Business (B2B) sales, this survey randomly selected a group of ResearchGate members and analyzed their most recent purchases.

Here are some of the key takeaways:

**End users influence purchasing decisions** - 80% of end users consider themselves either the sole decision-maker, a central decision-maker, or able to make a recommendation when their lab buys new products.

The decision to buy lab products isn’t often made by one person. **On average, 3.7 people are involved in purchase decisions** for both consumables and equipment.

**End users look at publications to help make their decisions** – when asked how they research and discover products, 49% of end users said looking within publications is the most helpful, followed by search engines and product review websites. Conferences and tradeshows had the least positive results.
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Marketing to a scientific audience is a particularly challenging area of B2B selling. It involves reaching a highly educated and skeptical group of customers who have very specific information needs. And as business hierarchies become more fluid, we’re seeing lab purchasing decisions becoming more complex than ever before.

The question around whom to market to also remains unclear. We hear this from our customers every day.

Specifically, they’re unsure about the influence of end users and lab researchers in purchasing decisions.

ResearchGate’s purpose is to connect the world of science, so we took the question to our network of 14+ million scientists and asked them how their labs purchase new products and equipment.

This report looks at the end users and their role in the buying decision, where they look for information on products, and what characteristics are most important to them.

Understanding customer buying decisions is crucial when deciding whom to market to and what type of media to use. We invite you to learn more about the buying behaviors of labs around the world by offering insights into what makes scientific customers tick. We hope you find this white paper helpful.
Who was asked?

285 randomly selected ResearchGate users participated in a 9-question survey. The respondents represented 31 countries across academic, corporate, government, and medical fields, and covered all career levels.

<table>
<thead>
<tr>
<th>Researcher type</th>
<th>Career level</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Academic 87.10%</td>
<td>• Senior 5.16%</td>
</tr>
<tr>
<td>• Corporate 1.84%</td>
<td>• Professor 38.50%</td>
</tr>
<tr>
<td>• Government 6.91%</td>
<td>• Postdoc 30.05%</td>
</tr>
<tr>
<td>• Medical 1.84%</td>
<td>• PhD Student 26.29%</td>
</tr>
<tr>
<td>• Other 2.30%</td>
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</tbody>
</table>

Where they came from

60+
21-60
11-20
1-10
What was asked?

**The last purchase**
Purchases are diverse and often infrequent, so the survey focused on the respondents' most recent purchase to keep results consistent.

**Consumables vs equipment**
Consumables can be defined as disposable products such as tips or customized compounds. Equipment covers more complex instruments and analytical tools such as chromatographers and PCR machines.

**Labs vs individual**
Business-to-business selling can involve multiple people, so questions were framed around how the labs – not the individual – made the purchase, and what the respondent’s role was in the decision.

**End users influence**
All respondents are end users of lab products. To understand the influence of these end users, respondents were asked if they identify as a central or the sole decision maker in the decision-making unit. They were considered an influencer if they offered a product suggestion but didn’t vote on the decision.

**Brand image**
There’s no doubt that brand image plays a part in product selection. Recognizing subconscious factors associated with brand preference can be difficult, however, so this survey focused on the factual elements of the purchase.
Before understanding how labs buy, it’s important to know what they buy. When asked about their last purchase, over half the respondents said they bought equipment, while 42% purchased consumables.

The last purchase

- Equipment 55%
- Consumables 42%
- Other 3%

Understanding the frequency of purchases can help you to time marketing efforts for maximum effect. Most consumables were purchased on a quarterly basis and cost under $1,000, on average. Equipment purchases happened every few years, with the largest number of purchases costing between $1,001 - $5,000, followed by a considerable number of purchases over $10,000.

Cost of purchase
Decision-making authority often doesn’t sit solely with one person. Although those with formal purchasing authority play a key role, most decisions are made by a group of stakeholders.

How big is the DMU?

While the size of DMUs fluctuate between organizations, this survey found that on average, 3.7 people are involved in purchase decisions. Consumables decisions involved 2-3 people, while equipment decisions involved 2-5 people.

There was an increase in the number of decision-makers as price increased, with purchases below $1,000 having on average 2-3 decision-makers, and purchases above $5,000 having between 3-5 decision-makers.
Do end users influence the decision?

80% of end users in this survey identified as someone who influenced the purchasing decision; they’re either directly part of the DMU or they can make a product recommendation to the DMU. Only 20% believed that they didn’t influence the decision at all.

**End user influence in lab purchase**

- Influenced the decision 80%
- Didn’t have any influence 20%

**Levels of influence**

- I was the sole decision-maker 11.8%
- I was a central part of decision-making 31.9%
- I made recommendations to the decision-makers 56.3%
Influencers outside the DMU

45% of all respondents said they made their recommendation to other central decision-makers, but that they don’t identify as part of the central DMU. These influencers didn’t vote on the final decision but believed that their suggestion was considered.

End users inside the DMU

26% of respondents believed they were central to the decision-making process, and could vote directly for their lab’s purchase decision. 9% identified as the sole decision-maker who purchased their labs last product. Product type didn’t have an effect, as purchases of consumables and equipment showed comparable results.

Is seniority important?

As could be expected, those who held more senior and managerial positions were twice as likely to be central to the purchase decision, either as central to the DMU or as the sole decision maker. If the respondent was more junior, they were more likely to make product recommendations or have no influence at all on the decision.

<table>
<thead>
<tr>
<th>Seniority vs buying power</th>
<th>Did not influence the decision</th>
<th>Made recommendation to the decision makers</th>
<th>Central part of decision making</th>
<th>Sole decision maker</th>
</tr>
</thead>
<tbody>
<tr>
<td>PhD Student</td>
<td>100%</td>
<td>80%</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>Postdoc</td>
<td>80%</td>
<td>60%</td>
<td>40%</td>
<td>20%</td>
</tr>
<tr>
<td>Professor</td>
<td>60%</td>
<td>40%</td>
<td>20%</td>
<td>0%</td>
</tr>
<tr>
<td>Senior</td>
<td>40%</td>
<td>20%</td>
<td>0%</td>
<td>0%</td>
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</table>

Seniority

0%  20%  40%  60%  80%  100%
The level of research conducted by the respondent varied depending on whether they identified as an influencer or as part of the DMU.

Even though influencers don’t directly vote for their preference, 95% conducted some or extensive research before making the recommendation.

Those with a central role in the DMU conducted the most research, with almost half of them doing extensive research beforehand.

62% of sole decision-makers said they conducted some research on the purchase, but they conducted less extensive research compared to influencers and central decision-makers. This could reflect their role as managers, in which they consider research-based inputs from their team members.

The level of research conducted might be expected to rise with purchase price, but the survey saw no significant correlation between the amount of research and the cost of a product. The only outlier was for purchases over $10,000, which saw extensive research increase from 36% to 51%.
Sources of information used for research

Information sourcing is more fragmented in today’s digital age, so understanding how an audience consumes information is valuable when considering marketing strategies.

When asked what sources were used to gather information, publications and product review websites were most popular for influencers and central decision-makers. Search engines were rated highest for sole decision makers, which may reflect the time constraints on senior managers. Conferences, tradeshows, and social media were ranked the lowest across all three groups.

Sources of information for influencers

53% of influencers mentioned publications as an information source.
Sources of information for central decision-makers

- Conferences / Tradeshows
- Peers
- Product review websites
- Publications
- Sales representatives
- Search engines
- Social media

52% of central decision-makers mentioned product review websites as an information source.

Sources of information for sole decision-makers

- Conferences / Tradeshows
- Peers
- Product review websites
- Publications
- Sales representatives
- Search engines
- Social media

41% of sole decision-makers mentioned search engines as an information source.
The most influential factors for end users

All consumer behavior is affected by both conscious and subconscious factors, but to understand the overarching trends specifically for scientific end users, respondents were asked to list the influential factors during their last lab purchase.

The most referenced factor across all three groups was ‘product specifications meeting my requirements’. As these respondents use the lab products directly, understanding the capabilities and determining whether it does the job is understandably important.

Sole decision-makers rated ‘low price’ higher than any other group, which presumably reflects their responsibility to manage their labs spend and stay within budget.

**Important factors for influencers**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easy to use and low learning curve</td>
<td>30%</td>
</tr>
<tr>
<td>Excellent customer support</td>
<td>30%</td>
</tr>
<tr>
<td>Low price</td>
<td>40%</td>
</tr>
<tr>
<td>Positive reviews</td>
<td>30%</td>
</tr>
<tr>
<td>Product specification met my requirements</td>
<td>50%</td>
</tr>
<tr>
<td>Respected brand name</td>
<td>20%</td>
</tr>
<tr>
<td>Used in similar experiments</td>
<td>30%</td>
</tr>
</tbody>
</table>
Price is a factor for any purchase, but the survey identified what could be outliers compared to other B2B buying decisions.

While low price was an important aspect for purchases under $5,000, when a purchase exceeded this threshold, having a competitive price became less important.

When a purchase was above $10,000, the importance placed on a good sales representative doubled.

The use of conferences to source information was referenced twice as much when the price exceeded $10,000.
Business to Business (B2B) selling is a complicated process in today’s digital age. Organizations are seeing more hierarchal fluidity and stakeholders present in buying decisions. To make matters even more complex, those involved are exposed to multiple brands every day and can bring with them strong preferences long before a sales call.

It’s not uncommon for B2B marketers to focus their efforts solely on the person with formal purchasing authority. Understandably, it’s a lot easier to channel activities towards one person who seemingly holds the decision-making power around product selection. And while most end users usually have opinions on the products they use, their level of influence is often unclear.

In the scientific industry, there are usually 3-4 people involved in new lab purchase decisions. In many cases, the purchaser is a lab manager or principal investigator. While these people play a key role, most end users believe that their opinions also significantly influence purchasing decisions.

End users mostly offer product recommendations to the decision-making unit (DMU), and frequently identify as part of the DMU themselves. They use publications to help source information beforehand, and the level of research conducted suggests the importance placed on their opinion.

The success of scientific selling relies on marketers to understand what influences the decision-making process and who to engage with in meaningful ways. The end user’s role no doubt varies between companies, but this survey highlights the collaborative approach to scientific purchases, and hopefully gives some insights into what makes scientists tick. We conclude that suppliers are most likely to be able to influence a purchasing decision by using a broadly-based marketing strategy that reaches end users as well as designated purchasers, and by involving end users’ preferred information sources.
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