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# Voice of Customer Research Analytical & Scientific Instruments

Voice of Customer Outcomes & Strategic Insights

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SAMPLE SIZE

100 Respondents

MARKET SEGMENT

Analytical Instruments

METHODOLOGY

Quantitative Survey

# Executive Summary



## Respondent Profile

Pharma & Chemical labs are the dominant segments (46% combined).

Buying is multi-stakeholder: Lab Managers, End Users, and Procurement all involved.

High expertise: 60% of users have 5+ years experience.



## Satisfaction & Risks

Overall CSAT is healthy at 68% (Satisfied/Very Satisfied).

Weaknesses: Software usability, Service response time, Spare parts availability.

25% of labs report frequent or very frequent downtime.



## Instrument Landscape

HPLC & UV-Vis are the most widely used instruments.

Aging fleet: 60% of installed instruments are ≥3 years old.

Strong potential for replacement cycles and technology upgrades.



## Value & Loyalty

58% of respondents perceive Good-to-Excellent value.

Repurchase intent is positive (60% Likely/Very Likely).

Traditional purchase models dominate, but 30% are open to AMC bundles or Leasing.



## Purchase Drivers

Performance & Service significantly outweigh price in decision-making.

Top triggers: Replacement of old equipment (42%) and Capacity expansion.

Service quality is the primary lever for brand switching.



## Future Needs

Strong demand for the "Smart Lab".

Top priorities: Automation (52%), Easier Software UI (45%), and Predictive Maintenance (40%).

High interest in remote monitoring capabilities.

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# Methodology & Overview

## RESEARCH METHOD

### Quantitative Survey

Online & Phone based data collection targeting verified lab professionals.

## SAMPLE SIZE

**n = 100**

Total qualified respondents from analytical and scientific instrument markets.

## DATA INTEGRITY

Cleaned for duplicates; outlier analysis performed; basic logic checks applied.

## Target Industries

- Pharmaceutical
- Food & Beverage
- CRO / Contract Labs
- Biotechnology
- Academic / Research
- Chemical
- Environmental Testing

## Respondent Roles

- ✓ End User / Analyst
- ✓ Lab Manager
- ✓ Procurement Specialist
- ✓ Decision Maker
- ✓ Key Influencer

## Instruments Scope

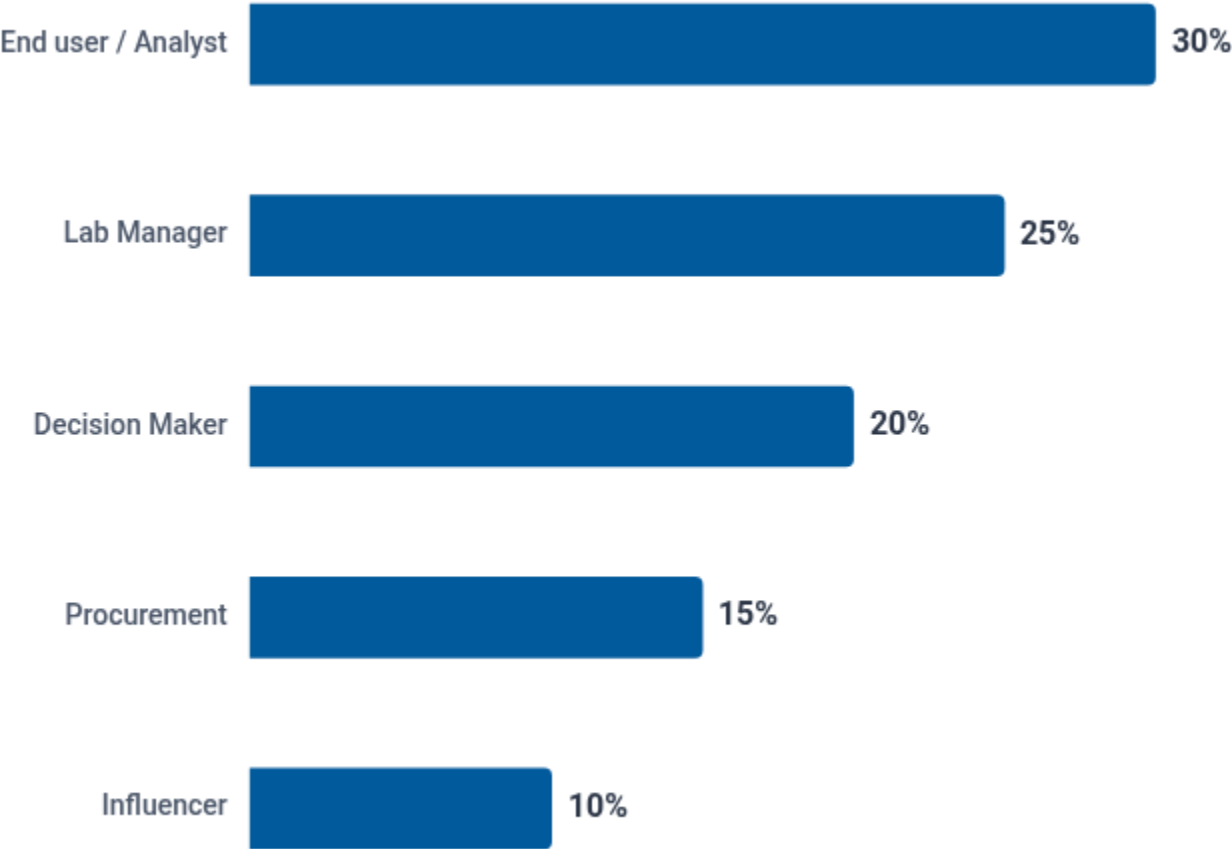
- ✓ HPLC & LC-MS/MS
- ✓ Gas Chromatography (GC)
- ✓ UV-Vis Spectrophotometry
- ✓ FTIR & ICP-OES/MS
- ✓ Particle Size Analyzer

# Respondent Profile

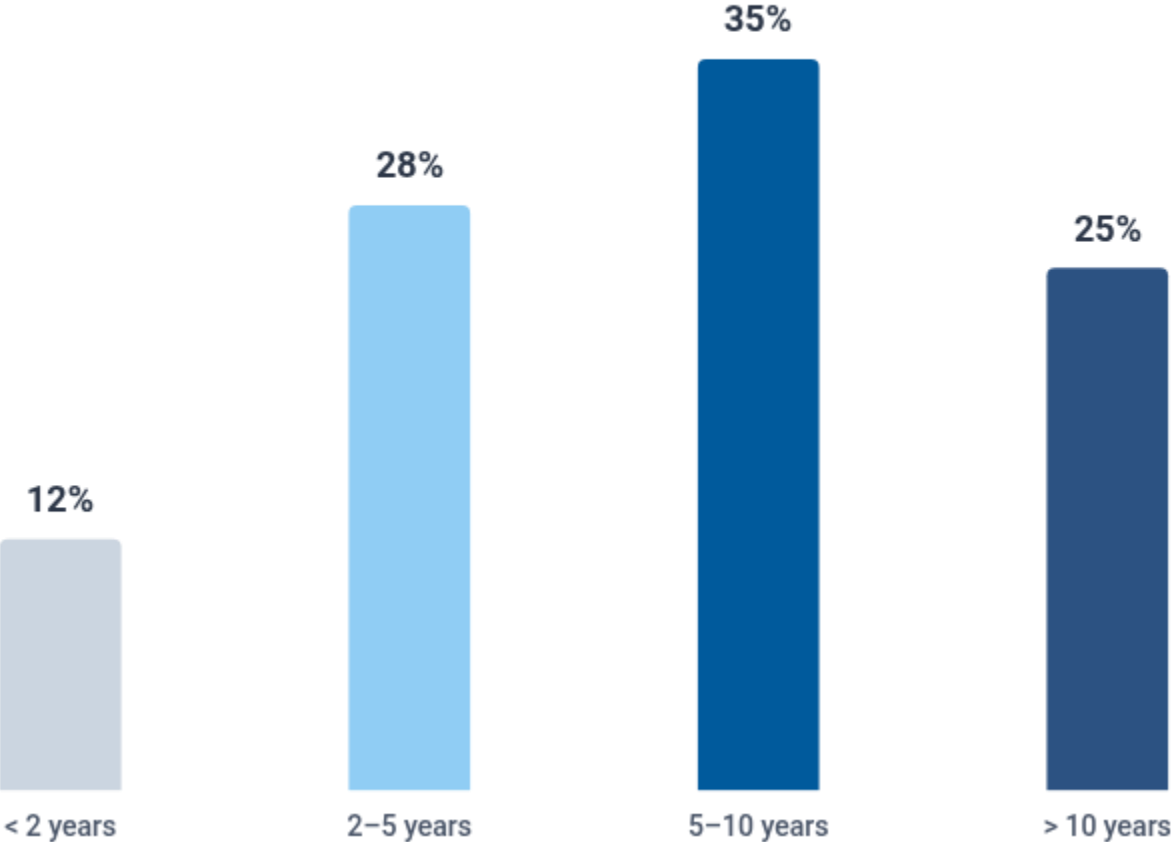
## KEY OUTCOME

Pharma, chemical, and research labs constitute over 60% of the key user segments.

● Pharmaceutical	28%
● Chemical	18%
● Academic / Research	15%
● Biotechnology	14%
● Food & Beverage	12%
● Environmental Testing	8%
● CRO / Contract Labs	5%



# Experience with Instruments

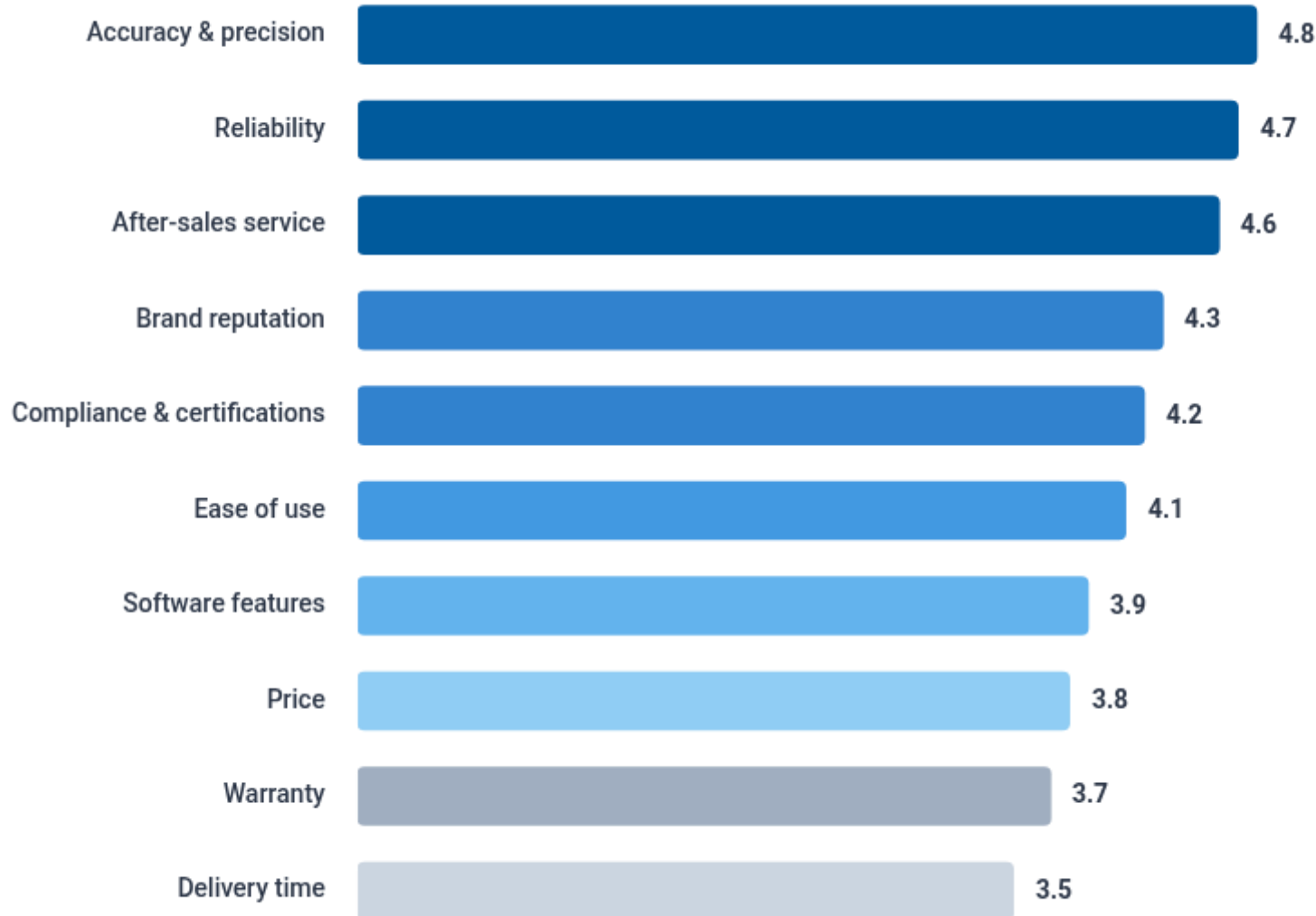


### KEY FINDING

A highly experienced user base means expectations for instrument performance, reliability, and precision are elevated.

**60%** of respondents have ≥ 5 years of experience working with analytical instruments.

# Importance of Purchase Attributes



## STRATEGIC INSIGHT

Performance (Accuracy, Reliability) and Service capability significantly outweigh Price in purchase decisions.

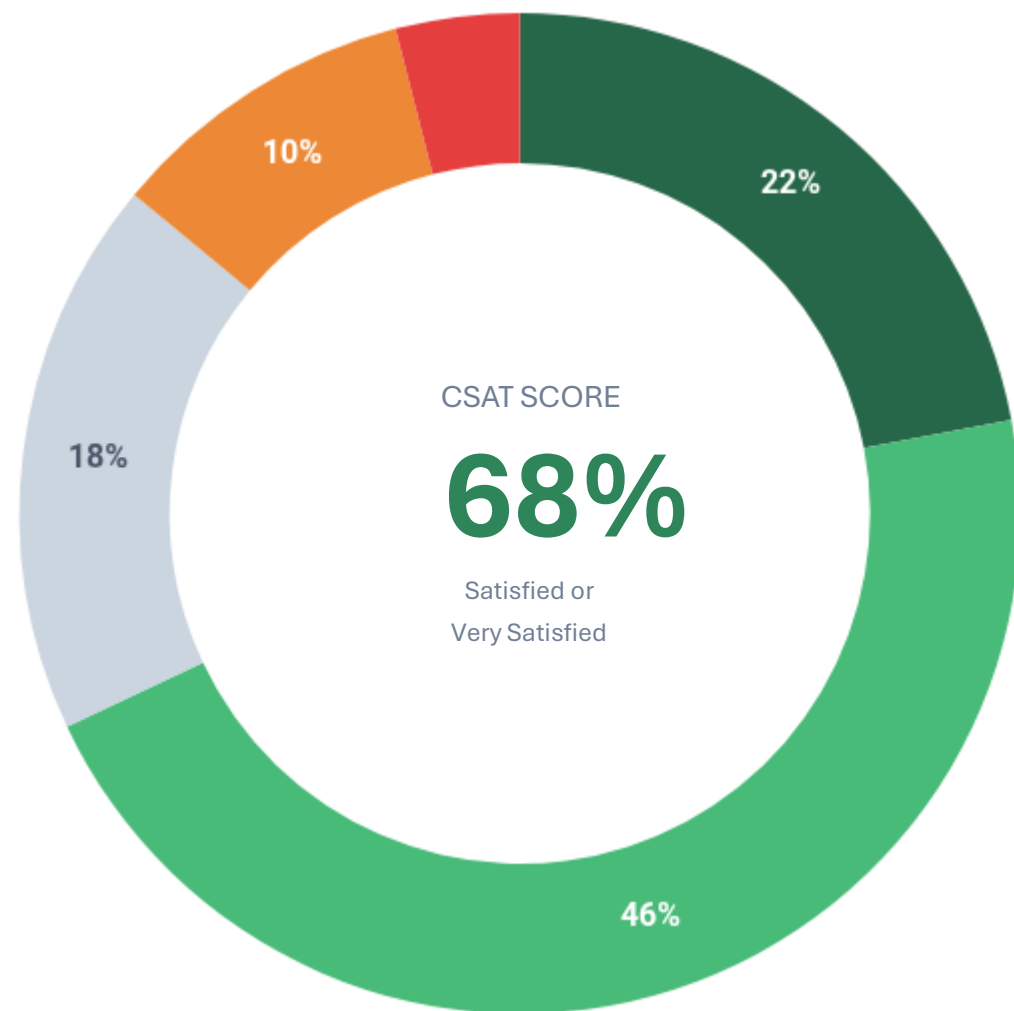
## Top 3

Factors are related to technical quality & support, not cost.

## #8

Rank of "Price" (Score: 3.8) suggests budget is secondary to results.

# Overall Satisfaction

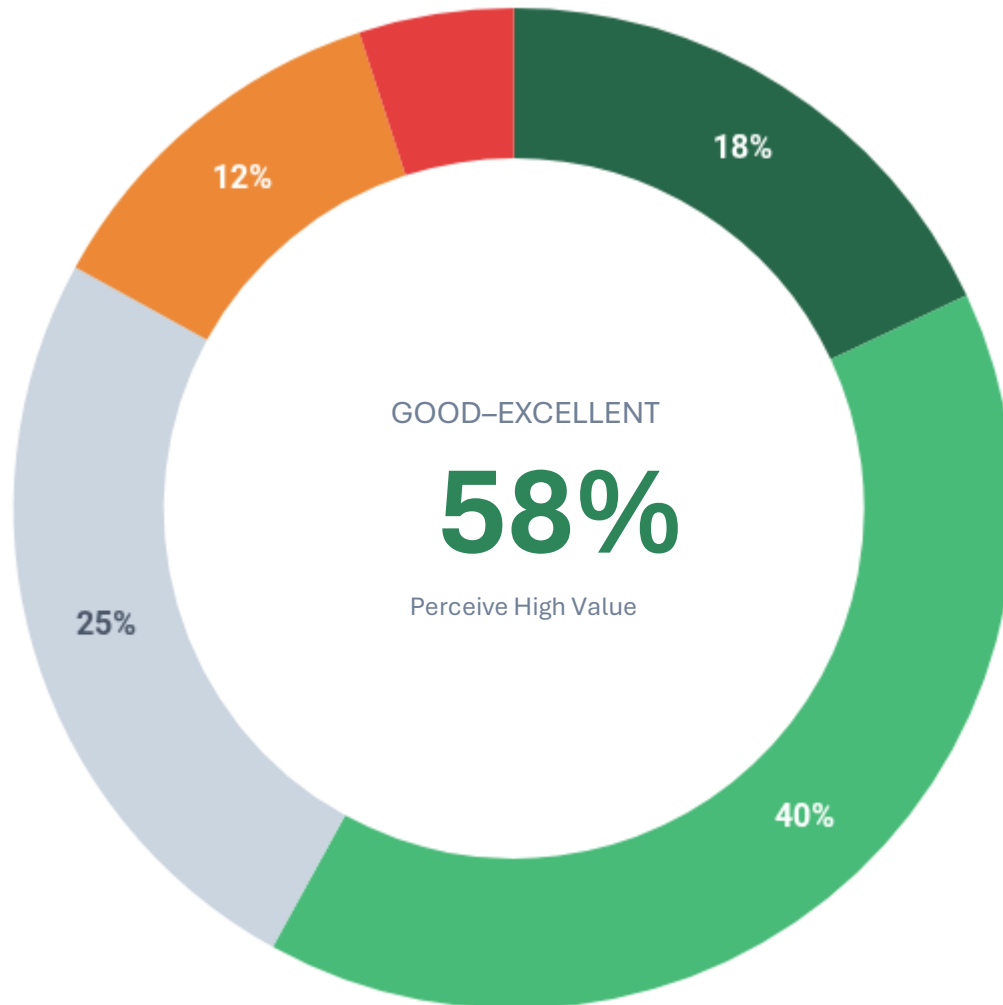


## STRATEGIC OUTCOME

While 68% are satisfied, the 14% dissatisfaction rate and 18% neutral base signal clear opportunities to improve service and software.

Very Satisfied	22%
Satisfied	46%
Neutral	18%
Dissatisfied	10%
Very Dissatisfied	4%

# Value for Money Perception



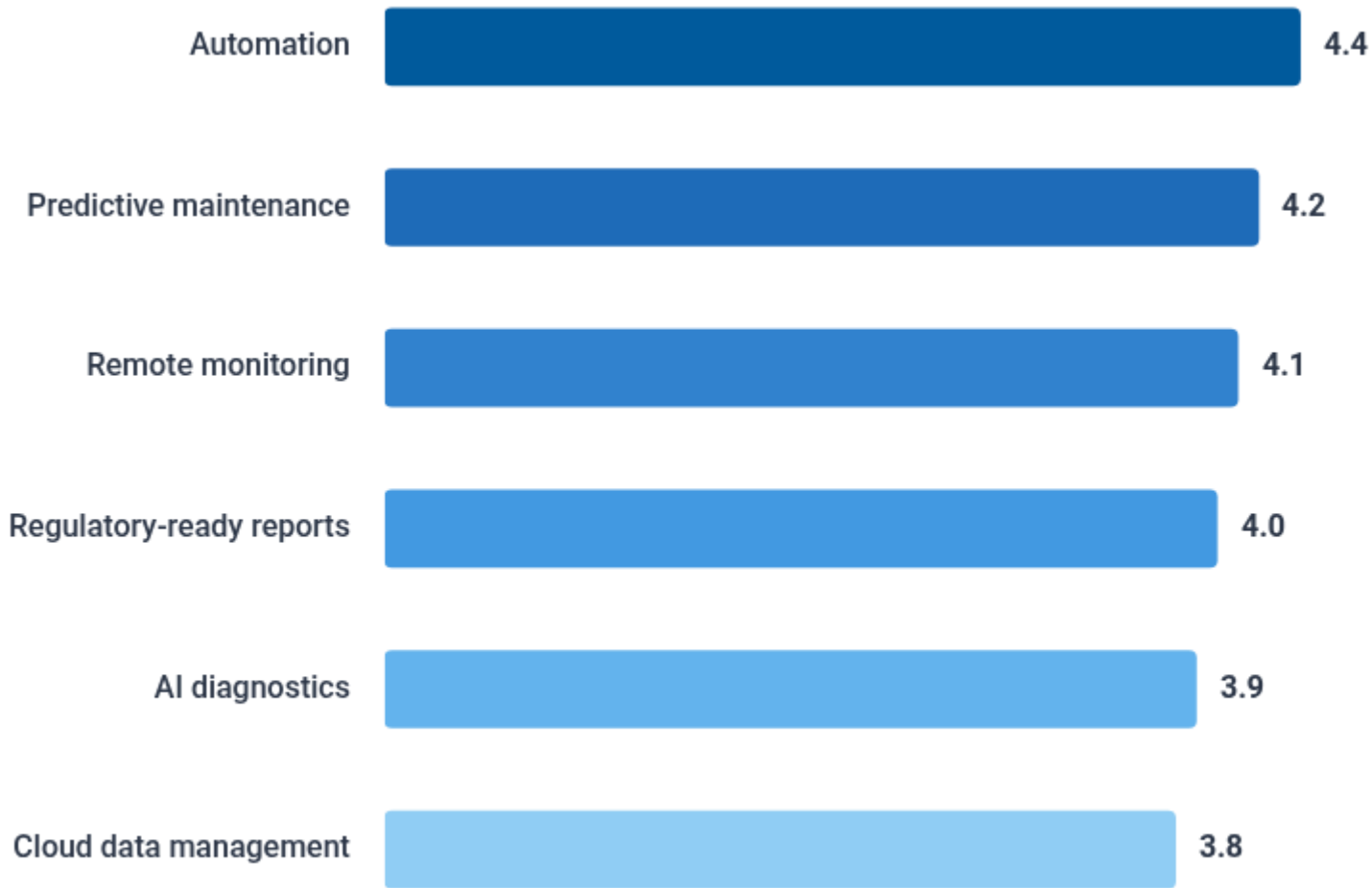
## STRATEGIC OUTCOME

A majority (58%) perceive the instruments as offering good-to-excellent value, validating the current pricing strategy, though competitive pressure remains.

Excellent	18%
Good	40%
Average	25%
Poor	12%
Very Poor	5%



# Interest in Future Technologies



## STRATEGIC INSIGHT

Strong openness toward smart & digital labs, with a clear preference for technologies that drive efficiency.

## #1

Automation leads interest (Score: 4.4) to reduce manual workload.

## Smart

Predictive maintenance & Remote monitoring both score > 4.0.

# Key Strategic Insights & Recommendations



## Service-First Differentiation

Address the top pain point (slow response) by improving SLAs and expanding spare parts logistics. Invest in engineer training to solve issues on the first visit.



## Enhance Software Experience

Simplify UI/UX to reduce complexity barriers. Offer role-based training modules to improve user confidence and satisfaction with software features.



## Proactive Reliability Strategy

Launch predictive maintenance and remote monitoring capabilities to specifically target the 25% of customers experiencing frequent downtime.



## Targeted Replacement Campaign

Prioritize the 60% of installed base >3 years old. Launch trade-in offers specifically for HPLC/UV-Vis users to drive upgrades.



## Multi-Stakeholder Playbook

Tailor sales pitches: Technical specs for End Users, Uptime/TCO for Lab Managers, and Flexible Pricing for Procurement.



## Pricing Innovation

Introduce tiered AMC packages and pilot lease/subscription models to capture the 30% segment open to non-traditional purchasing.

# Thank You

Do you have any questions?

**+91-959-915-8047**

**[info@sperresearch.com](mailto:info@sperresearch.com)**

**<https://www.sperresearch.com>**

**Corporate Office:**

**#303-304, Tower B, Noida One, Sector 62, Noida, India**