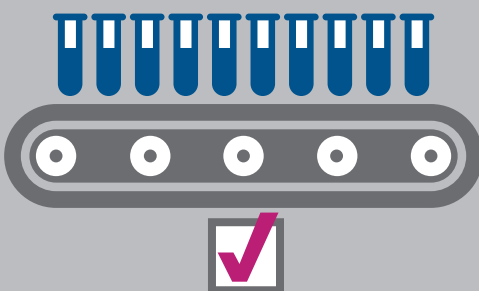


WHAT LAB MANAGERS WANT

Agilent Technologies commissioned 'Understanding Key Challenges and Pain Points in the Global Laboratory Market', an independent global survey of lab managers from different market segments. The primary objective of the survey was to understand lab managers pain points and find out what they need to address their most pressing concerns, as well as reveal the differences and similarities of the challenges they face.

Our survey revealed...

Better productivity and higher throughput



Almost **70%** of lab managers surveyed work in labs processing over **500 samples** per week



45% indicate that they face significant pressure to **process more samples**

Less maintenance/downtime and improved workflow

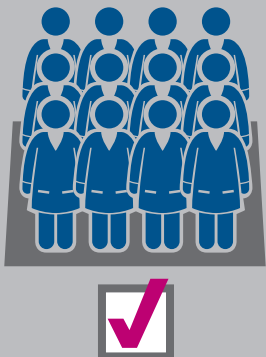


Around **70%** of productivity of laboratories is limited largely by **scheduled maintenance** and **unplanned downtime**



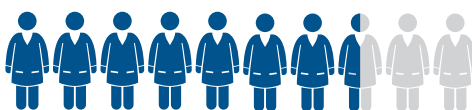
Globally **75%** of respondents find **instrument maintenance/downtime** to be their biggest challenge in managing their laboratories

More space



1 in 5 lab managers think that **size/footprint** of their laboratory is a limiting factor affecting operations today

lab managers think that **size/footprint** of their laboratory is a limiting factor affecting operations today



Of those **75%** believe **space-saving designs of instruments** can help overcome this challenge

"Due to high volume of samples we receive every day, we need to enhance our workflow system"

"The main area of focus is to give the maximum results with high reliability and accuracy."

"We encounter a high volume of testing samples every day and consistency in workflow is a big challenge due to down-time"

"Our main challenge is the foot size of the laboratory as we are growing and experiencing high volume of samples"



The survey was conducted by Frost & Sullivan via a 30-minute online questionnaire in 3 regions: Europe, Asia and the USA. A total of 700 lab managers were surveyed who varied in experience, as well as company size and primary function.