

# Benchmarking for 2024: Understanding the Life Science Customer Experience

Webinar: September 26, 2024



# Presenter

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**Danyi Wu, PhD**  
**Manager, Scientific Advisory Services**



# Study Overview & Objectives

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# Study Overview

1

BioInformatics, part of Science and Medicine Group, conducted market research to understand the customer experience of life scientists.

Specific objectives include:

- Understand and compare single and multi-year customer experience performance for 28 brands.
- Explore customer satisfaction on specific touchpoints associated with the pre-purchase experience, product experience, and post-purchase experience.
- Understand the relative importance of specific attributes for customer experience.
- Determine supplier rankings and long-term trends in customer experience since 2016.

2

BioInformatics designed an online quantitative survey to address these objectives. This study is longitudinal and trends over the course of eight waves starting in 2016.

- The survey contained 38 questions (including demographics) and took a median time of 10 minutes to complete.
- In 2024, it was fielded to n=760 respondents, primarily members of the Science Advisory Board (SAB) -- a segment of the scientific community with a demonstrated willingness to participate in market research activities.

3

The qualification criteria for this survey in brief:

- Must work in Academia or Pharma / Biotech segments of the life science industry within North America, Europe and Asia Pacific.

4

A summary of the results is presented in this webinar. Data trends can be further explored via an accompanying Tableau workbook, available in the [Knowledge Center](#). The Tableau workbook is fully interactive, and can be used to export charts for presentations, further research, or other needs.

# Customer Experience Model for the Life Science Market

- Improving the customer experience with life science suppliers is increasingly a target for improving overall customer satisfaction and a potential opportunity for brand differentiation on factors beyond product performance, service plans, and price.
- The complete customer experience for the life science market is composed of multiple touchpoints, or interactions, between customer and supplier, with each touchpoint representing a branding opportunity. The customer experience model arranges key touchpoints chronologically and within the following larger categories of the purchasing life cycle: pre-purchase, product, and post-purchase experience.

### *Pre-Purchase Experience*

### *Product Experience*

### *Post-Purchase Experience*



- Life science suppliers are scored based on how satisfied their customers are with a wide range of touchpoints. Results are presented in aggregate (Industry Average) and at the supplier level. This report also identifies the relative importance of factors contributing to positive overall customer experiences so suppliers can identify strengths to leverage and weaknesses to target.

*Note: The "COVID-19 Support Provided" touchpoint was asked in Wave 4 (2020) only and is not included in the Overall Customer Experience Score calculations. Results for this attribute are visible in the accompanying Tableau deliverable.*

# Touchpoint Attributes

Within each touchpoint, we asked customers multiple questions to capture the attributes valued by life science customers.

These touchpoints encompass the experiences that lead to repurchase and recommendation of instrumentation and consumables from various suppliers.

*Note: The "COVID-19 Support Provided" touchpoint was asked in Wave 4 (2020) only and is not included in the Overall Customer Experience Score calculations. Results for this attribute are visible in the accompanying Tableau deliverable.*

Touchpoint		Question
Pre-Purchase Experience	Product Awareness	How BELIEVABLE is the advertising that you have seen in the last 6 months from the following suppliers?
		In the last 6 months, how EASY has it been to search for products of interest on the websites of the following suppliers?
		Thinking about the conferences/meetings (in-person & virtual) and webinars you have attended in the last 12 months, how often do you interact with the following suppliers during these events?
	Product Knowledge	How FAMILIAR are you with the full range of products offered by the following suppliers?
		How INNOVATIVE are the products provided by the following suppliers?
	Product Selection	In the last 6 months, how EASY has it been to determine the best product(s) for your needs on the websites of the following suppliers?
		In the last 6 months, how SATISFIED have you been with product pricing and promotions offered by the following suppliers? (Wave 6, 2022)
		In the last 6 months, how SATISFIED have you been with the transparency of product inventory from the following suppliers? (Wave 7, 2023)^
		In the last 6 months, how SATISFIED have you been with the transparency of shipping prices, terms and conditions provided by the following suppliers? (Wave 6, 2022)
		In the last 6 months, how SATISFIED have you been with the regularity of shipping updates from the following suppliers? (Wave 7, 2023)^
	How WELL do the products that you use from the following suppliers cover your entire experimental workflow?	
Product Experience	Product Integrity	When you receive deliveries from the following suppliers, how OFTEN are the products received in good condition?
		How CLEAR are the product use instructions/training provided by the following suppliers?
		How USER-FRIENDLY is the product design used by the following suppliers?
		How ECO-FRIENDLY is the product packaging used by the following suppliers?
	Service Provided	In the last 6 months, how HELPFUL were the following suppliers' sales representatives and/or account managers during all phases of the purchasing process? (Wave 6, 2022)
		In the last 6 months, how FAVORABLE has your impression of customer service provided by the following suppliers been? (Wave 6, 2022)
Post-Purchase Experience	Support Provided	In the last 6 months, how RESPONSIVE were the following suppliers' sales representatives and/or account managers during all phases of the purchasing process? (Wave 6, 2022)
		In the last 6 months, how WELL has the phone/email technical support provided by the following suppliers answered your questions? (Wave 6, 2022)
		In the last 6 months, how WELL has the online technical support by the following suppliers answered your questions? (Wave 6, 2022)
		In the last 6 months, how WELL has the in-lab technical support/service by the following suppliers answered your questions? (Wave 6, 2022)
	Satisfaction and Loyalty	How LIKELY is it that you would recommend the following suppliers to an associate or colleague?
		Overall, how SATISFIED are you with the products and services you obtain from the following suppliers?
		Please rate your OVERALL experience when interacting with the following suppliers.

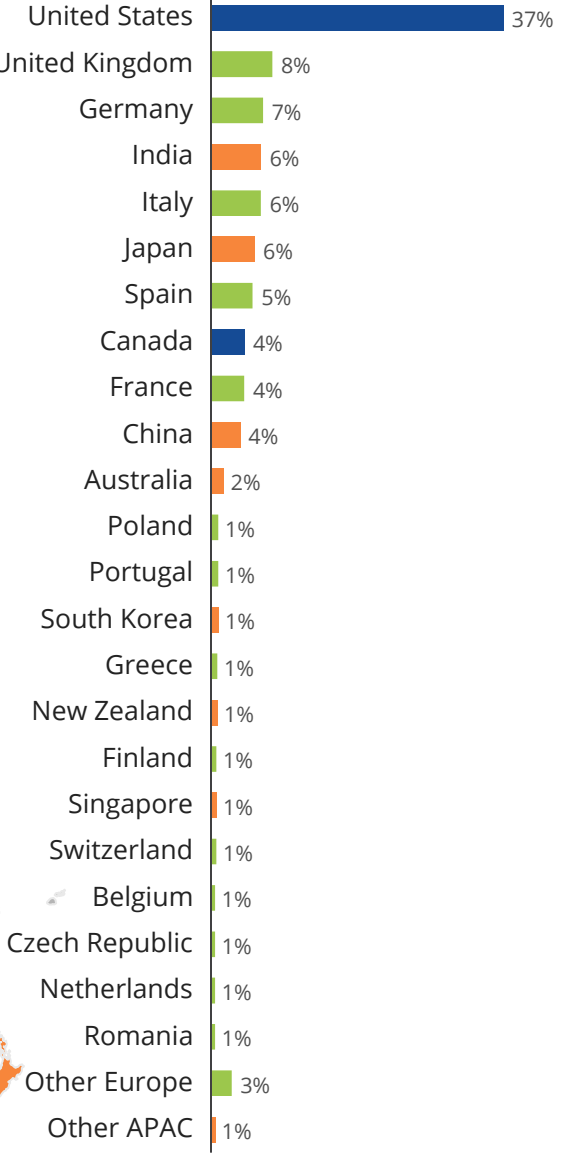
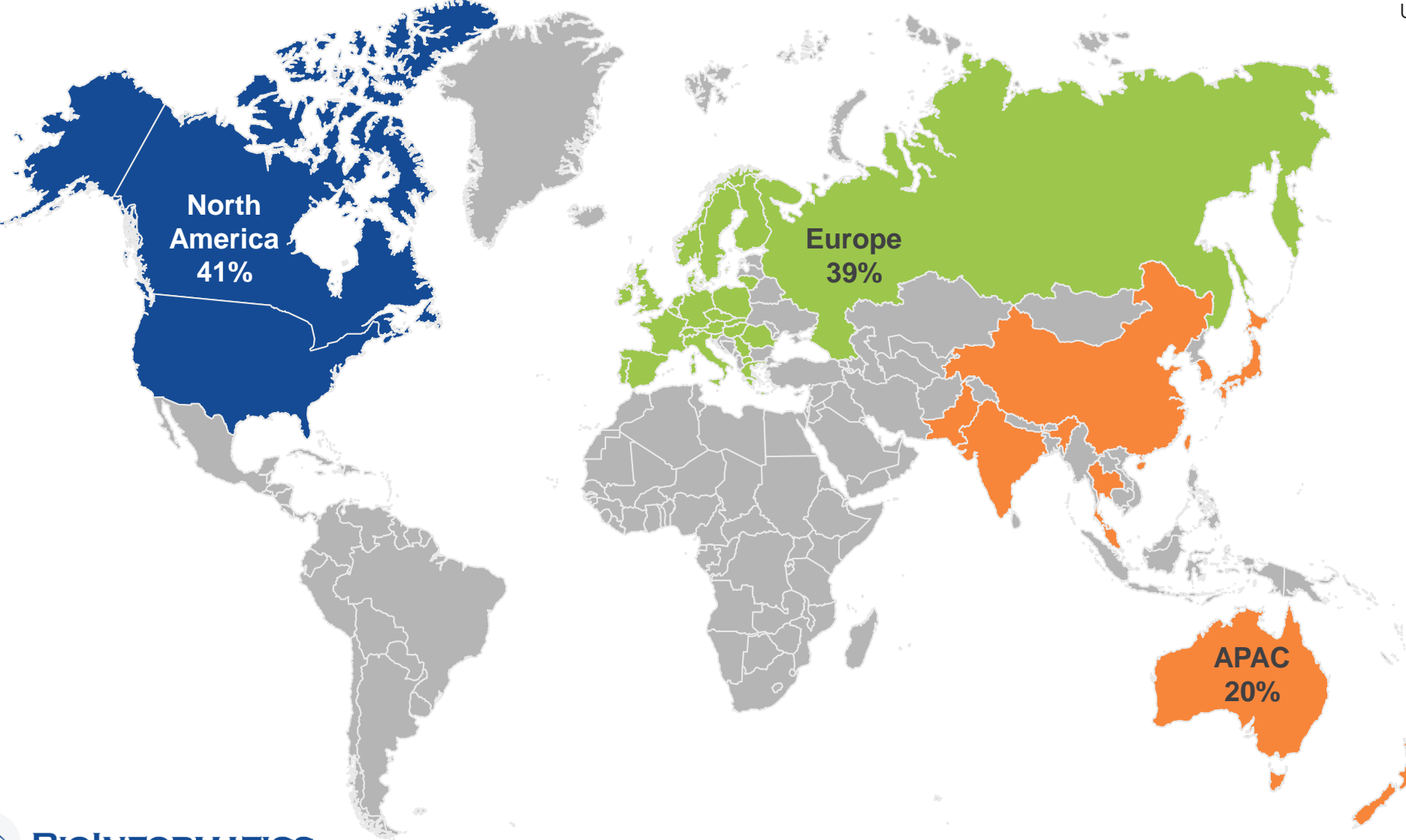




# Demographics

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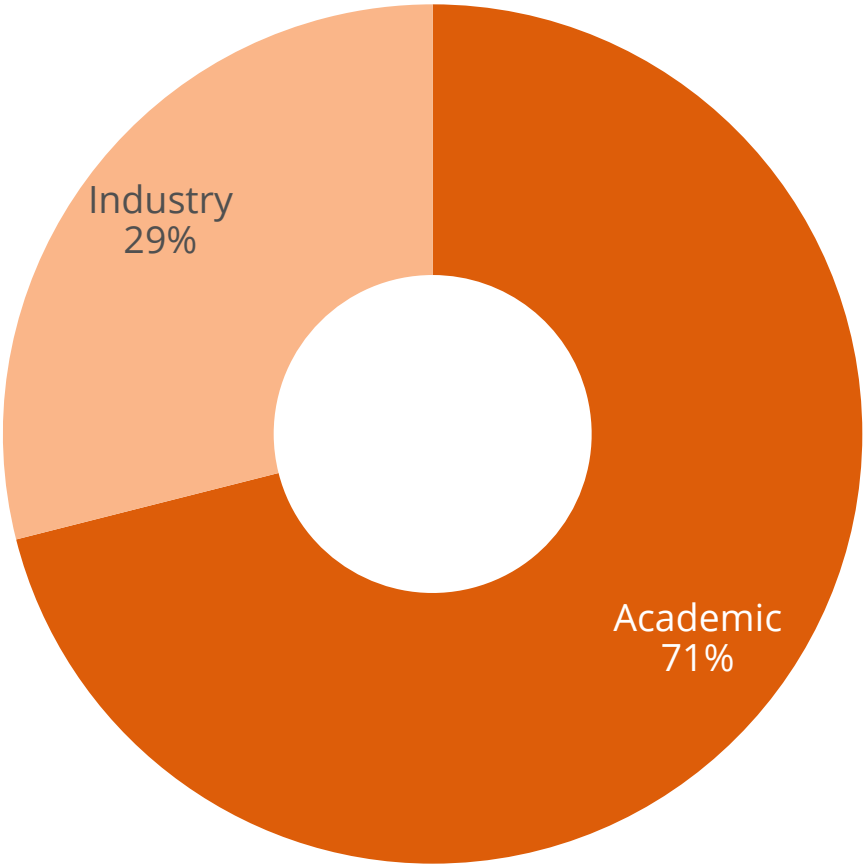
# Region & Country (n=760)



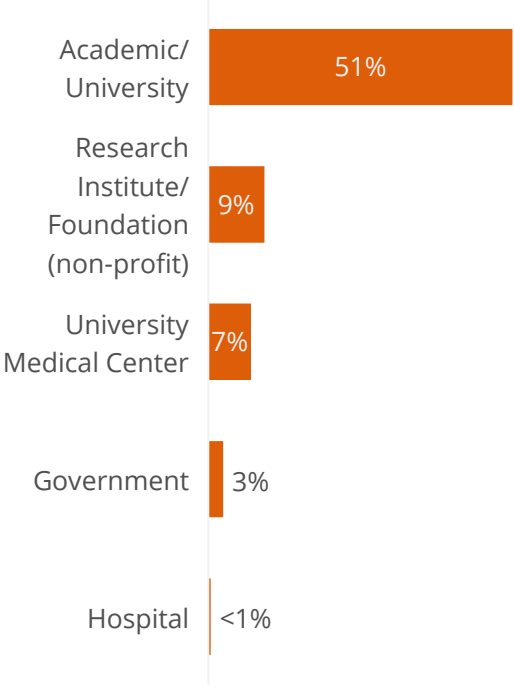


# Respondent Profile (n=760)

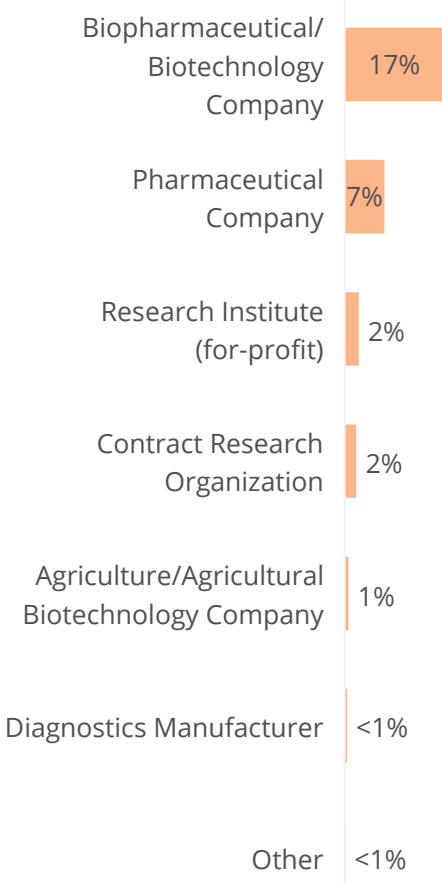
## Employment Sector



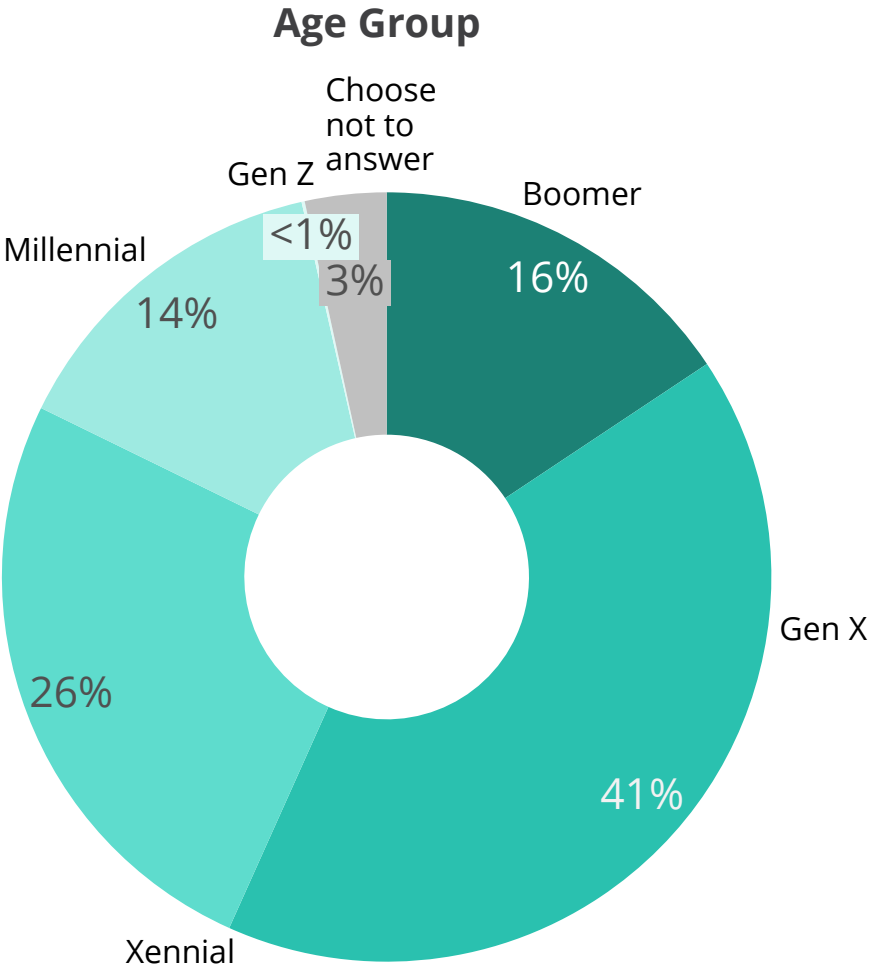
### Academic



### Industry

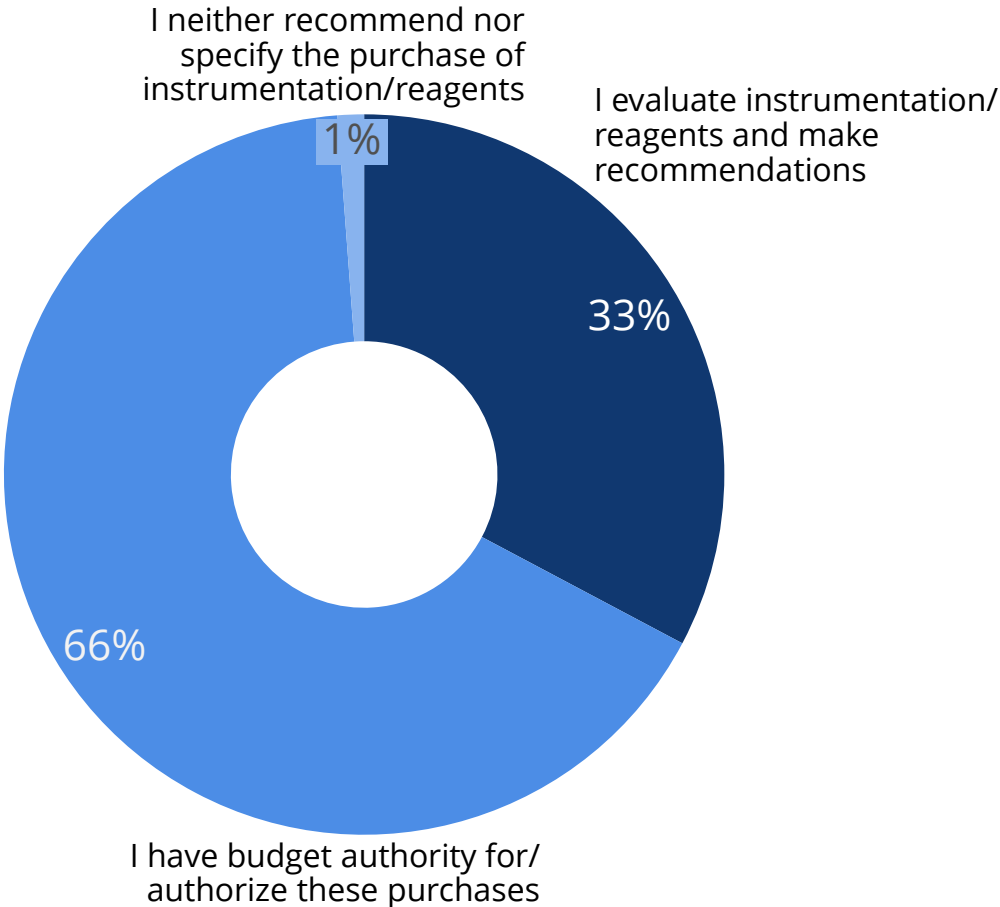


# Respondent Profile (n=760) (continued)



# Respondent Profile (n=760) (continued)

## Role in Selection of Instruments/Reagents



## Method of Ordering Products from LS Suppliers

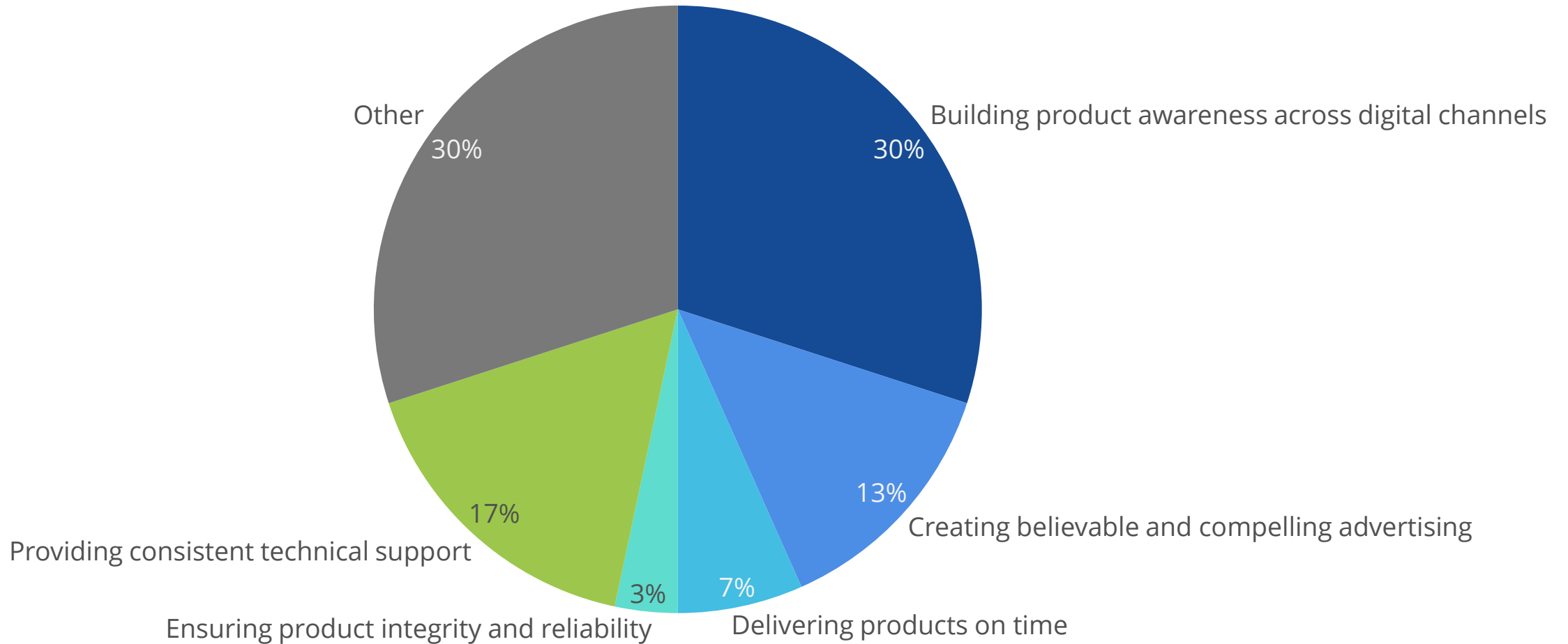




**What's the biggest  
challenge in your  
customer experience  
strategy?**

# Engaging with customers pre-purchase is challenging for suppliers.

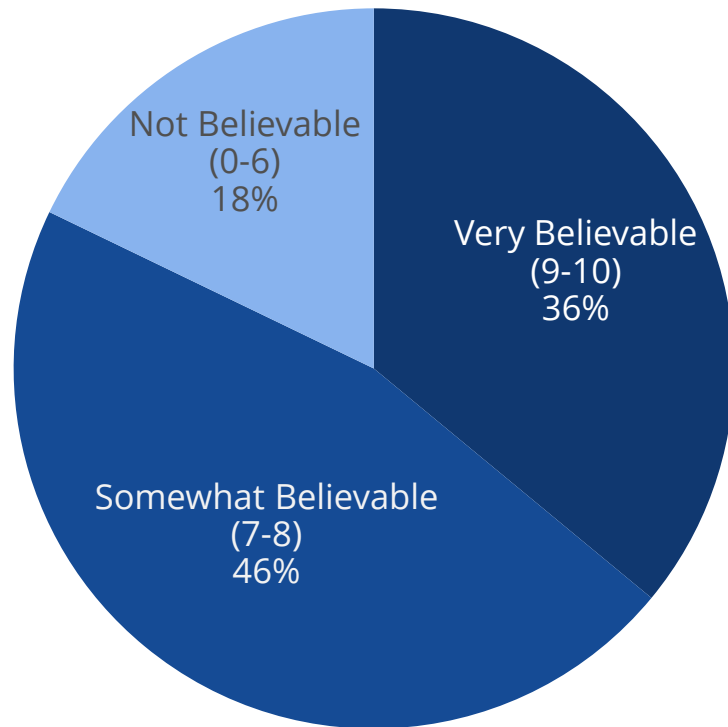
Webinar Poll Results





# 46% of respondents indicate that recent advertising is *somewhat believable*.

Believability of Advertising — Industry Average (responses=1,692)



ZEISS, SCIEX, and New England Biolabs have the most believable ads in the last 6 months.



ZEISS



SCIEX



New England Biolabs

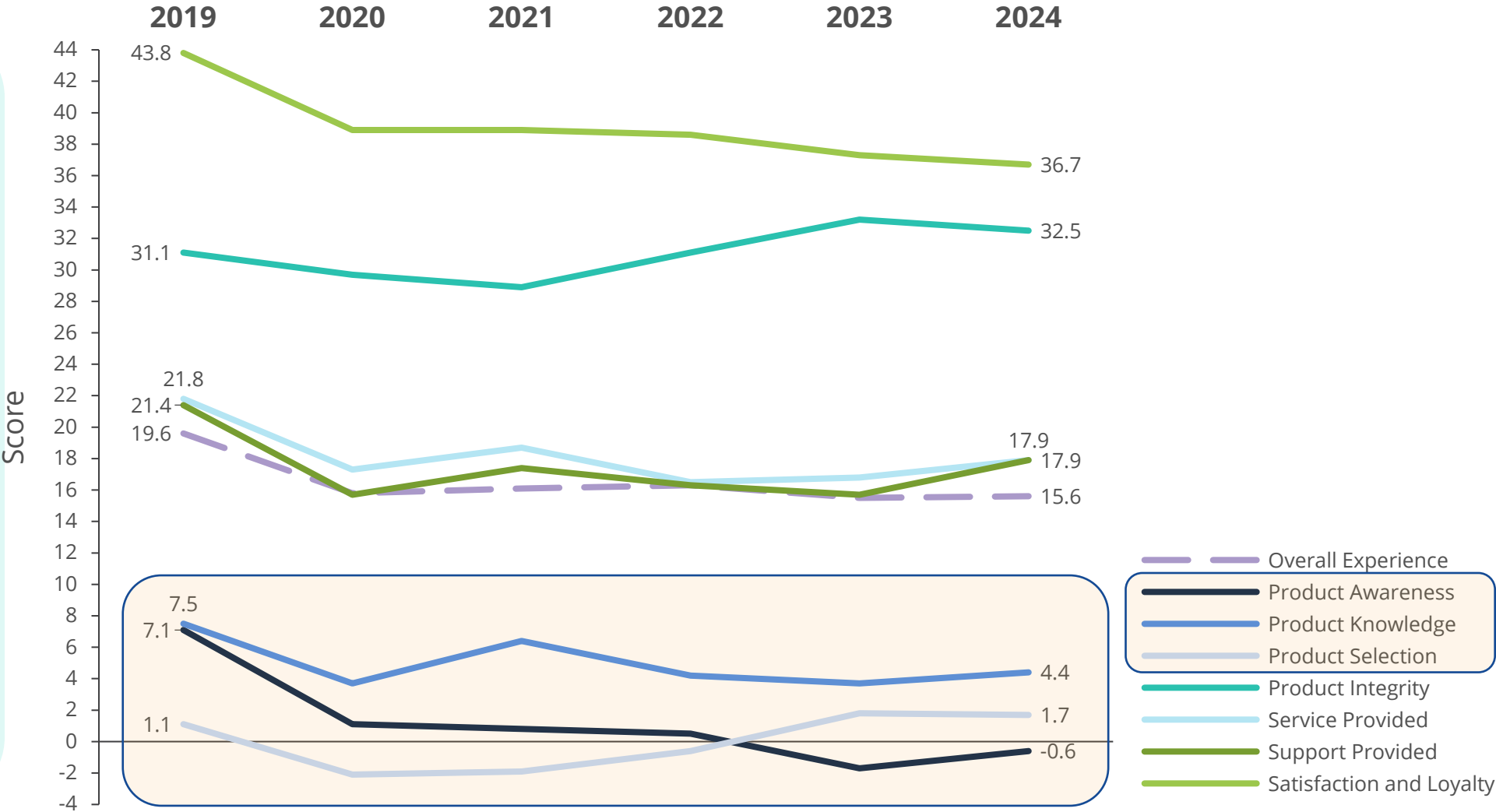
Q4. How BELIEVABLE is the advertising that you have seen in the last 6 months from the following supplier(s)? (choose only one for each)

Note: Respondents were asked to provide an answer for each supplier they answered about on an 11-point scale where 10=extremely believable and 0=not at all believable. Results exclude respondents who indicated "N/A, I have not seen any advertising from this supplier in the last 6 months."

# Industry Performance 2019-2024

**Overall customer experience is stable industry-wide since 2020.**

- Despite high scores overall, Satisfaction and Loyalty has steadily declined since 2019.
- Satisfaction with support and service touchpoints have remained stable, despite trending upwards in 2024.
- Satisfaction with pre-purchase touchpoints remain low across the life science industry. Nevertheless, pre-purchase experience scores have trended upwards in 2024, indicating that progress has been made in generating product awareness, improving product knowledge, and aiding product selection.



# Year Over Year Performance

Phase in Purchasing Life Cycle	Customer Experience Touchpoint	Industry Average 2023	Industry Average 2024
Overall Experience		15.5	15.6 ↑
Post-Purchase Experience	Satisfaction and Loyalty	37.3	36.7 ↓
Product Experience	Product Integrity	33.2	32.5 ↓
	Service Provided	16.8	17.9 ↑
Post-Purchase Experience	Support Provided	15.7	17.9 ↑
Pre-Purchase Experience	Product Knowledge	3.7	4.4 ↑
	Product Selection	1.8	1.7 ↑
	Product Awareness	-1.7	-0.6 ↑

Overall customer experience score is on par with 2023.

Improvements in 2024:

- Service Provided
- Support Provided
- Product Knowledge
- Product Awareness

Decreased customer satisfaction with touchpoints is an indicator that customers have a set standard that vendors are not meeting. The greatest decreases from 2023 to 2024 are:

- Product Integrity
- Satisfaction and Loyalty

Note: See the Methodology section on how the customer experience score is calculated.

# 2024 Leaders in Customer Experience

SCIEX leads in 2024 due to strong performance across pre-purchase touchpoints.



Customer experience varies by market segment. IDT and SCIEX lead in Academia, while Agilent and Illumina lead in Industry.

# 2024 Leaders in Customer Experience

High Performance on Multiple Touchpoints Contributes to the Best 2024 Customer Experience Scores

	Customer Experience Score Ranking	Product Awareness	Product Knowledge	Product Selection	Product Integrity	Service Provided	Support Provided	Satisfaction & Loyalty
SCIEX	1	★	★	★				
IDT (Integrated DNA Technologies)	2			★	★			★
Bio-Rad Laboratories	3		★	★		★		
New England Biolabs	4				★		★	★
Promega	5				★	★	★	★

Brands that deliver high performance across multiple touchpoints provide the best overall customer experience

Note: "★" indicates the brand is one of the top 5 within the corresponding touchpoint.



# 2024 Most Improved Suppliers

Top 5 Most Improved Suppliers from 2023 to 2024

Increased return on investment can be achieved by concentrating on customer experience factors.

- SCIEX, Thermo Fisher Scientific, ZEISS, Illumina, and Beckman Coulter made significant advancements in 2024.

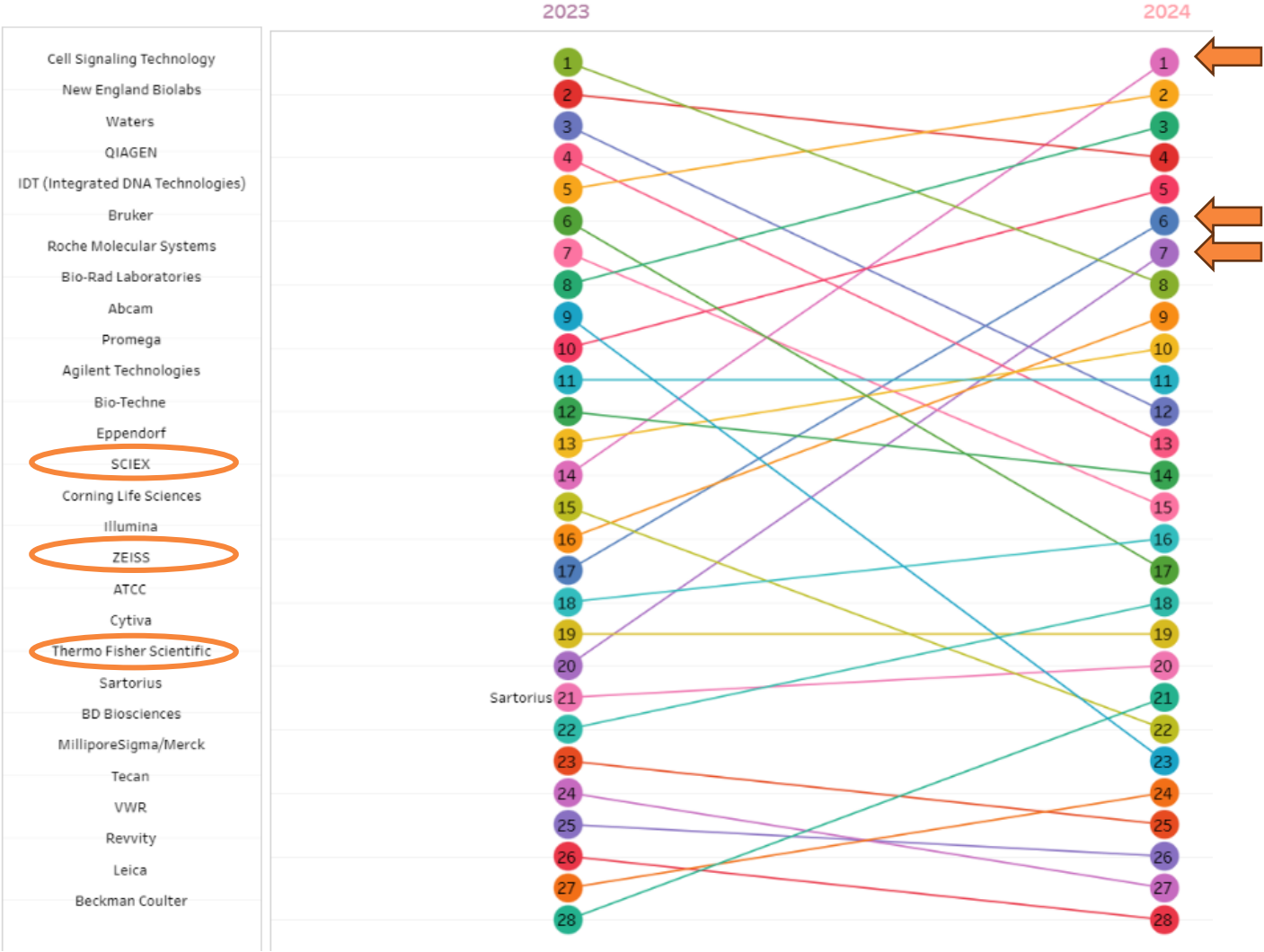
	Rank in 2023	Rank in 2024	Change in Rank	Overall Experience Score in 2023	Overall Experience Score in 2024	Change in Score
SCIEX	14	1	+13	16.1	25.7	+9.6
Thermo Fisher Scientific	20	7	+13	13.6	22.4	+8.8
ZEISS	17	6	+11	14.7	23.2	+8.5
Illumina	16	9	+7	15.4	21.7	+6.3
Beckman Coulter	28	21	+7	3.0	9.1	+6.1

# Trends in Overall Customer Experience Rankings

**Top 3 Ranking Gains in 2024:**

- SCIEX
- Thermo Fisher Scientific
- ZEISS

➤ See Tableau 3a. Customer Experience - Trended



# Relative Importance of Touchpoints in 2024

## Legend

Pre-Purchase Experience	Product Awareness	Believability of advertising	+
		Ease of searching website	□
		Frequency of interacting with suppliers at conferences and meetings	○
	Product Knowledge	Familiarity with full product offering	×
		Perception of product innovation	*
	Product Selection	Product Selection	Ease of determining best equipment
Satisfaction with product pricing and promotions			△
Satisfaction with transparency of product inventory			▽
Satisfaction with shipping prices, terms, and conditions			▷
Satisfaction with regularity of shipping updates			◁
How well products cover workflow			○
Product Experience	Product Integrity	How often product is received in good condition	○
		Product training is clear	×
		Product design is user-friendly	□
		Product packaging is eco-friendly	+
	Service Provided	Helpfulness of sales representatives	◇
		Favorable impression of customer service	*
Post-Purchase Experience	Support Provided	Ability of in-lab technical support/service to answer questions	○
		Ability of online technical support to answer questions	◇
		Ability of phone/email technical support to answer questions	+
		Responsiveness of sales representatives	×
	Satisfaction & Loyalty	Overall satisfaction	*

Touchpoints within the post-purchase experience and service provided remain essential to the overall customer experience and are strengths industry-wide.

➤ See Tableau 5a. Quadrant Analysis



# Opportunities in Customer Experience

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## Improve the pre-purchase experience.

Pre-purchase experience touchpoints remain in the single-digits despite a slight uptick since 2023. Though suppliers are effective at creating believable advertisements and optimizing the search functionality of their websites, they remain unsuccessful at engaging with researchers at conferences and meetings.

Over the past few years, strides have been made with increasing familiarity with full product offerings and offering complete workflow solutions, though perceptions of innovation have diminished.



## Improve on supplier perceptions

Overall, respondents indicate that supplies are approachable and responsive, with better service than 1 year ago. However, respondents diverge in their perceptions about the affordability vs. premium pricing of suppliers.

Though overall satisfaction with pricing and promotions has risen from -18.9 in 2023 to -17.2 in 2024 industry-wide, it remains a key touchpoint to monitor within product selection.



## Cater to trends in sustainability.

Lack of eco-friendly packaging is the only negative score in product experience; suppliers should be mindful of new sentiments around sustainability that may drive future purchase and experiences.

A person is shown from the side, pointing with a red pen at a large computer monitor. The monitor displays a complex data visualization, likely a Tableau dashboard, with various charts and tables. The person is wearing a light-colored shirt. The background is a blurred office setting. The entire image has a blue color overlay.

# Demonstration: Navigating Tableau

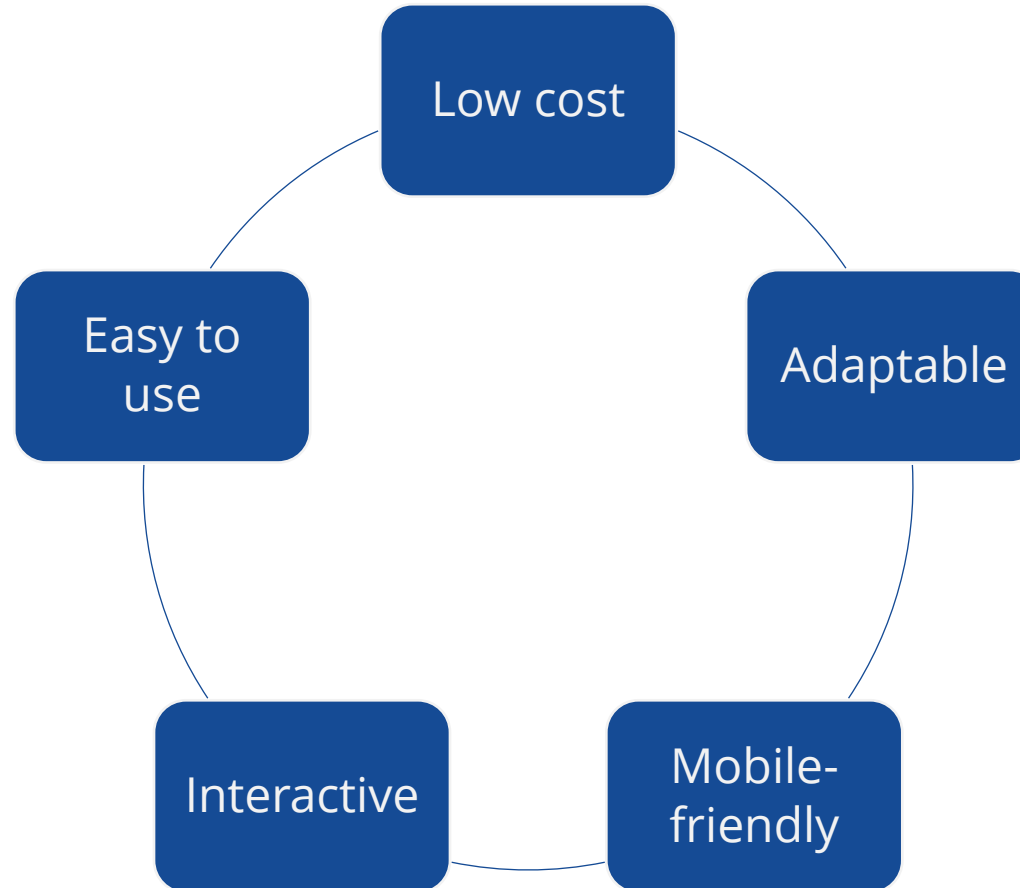
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# Access this Report's Interactive Tableau Data

The interactive, straightforward, quick, and user-friendly design of Tableau has made it well received for the following reasons:

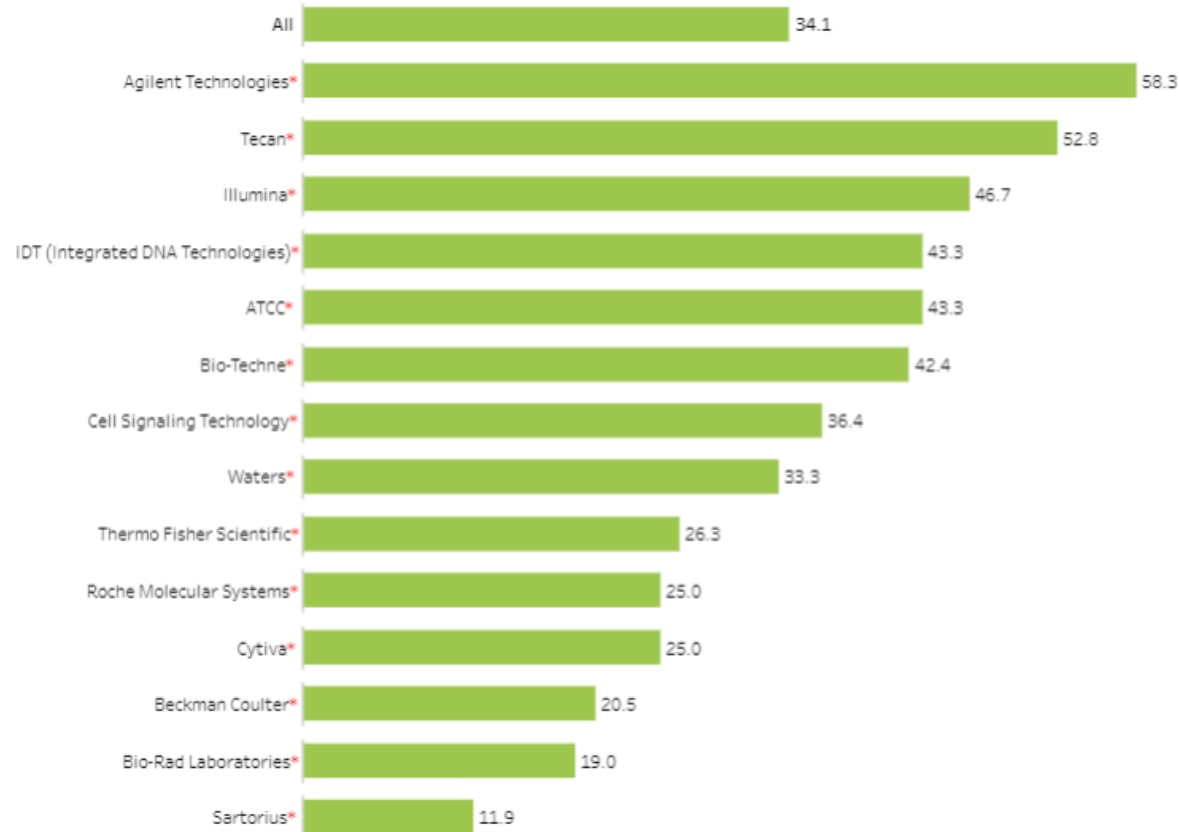
- It has a low-cost relative to other big data visualization tools
- Can handle other scripting languages
- Can be used on smart devices like tablets or smartphones
- Drag and drop functions provide interactive visual representations
- Coding knowledge is not necessary to learn Tableau



# Touchpoint Navigation

**SATISFACTION & LOYALTY**

Filter by: Touchpoint: SATISFACTION & LOYALTY Wave: 2024 Region: North America Employment Sector: Industry Age: (All)



*Note: Click on the chart elements to highlight suppliers. Click again on the chart to unhighlight the chart.*

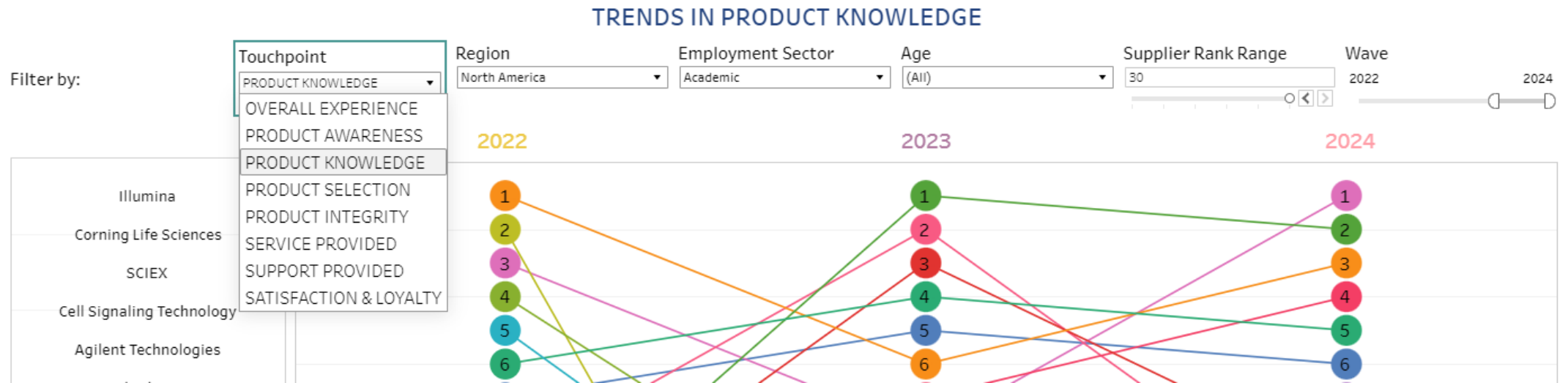
*To highlight multiple suppliers at once, click on one side of the chart and drag a box over to the other side of the chart, highlighting the suppliers you would like to see or hold down the CTRL key and select the suppliers you wish to highlight. Click on the chart again to unhighlight.*

Select key filters of interest to display segmented data of interest:

- Touchpoint
- Wave (year)
- Region
- Employment sector
- Age

➤ See Tableau 2a. Customer Experience

# Navigation of Key Analyses

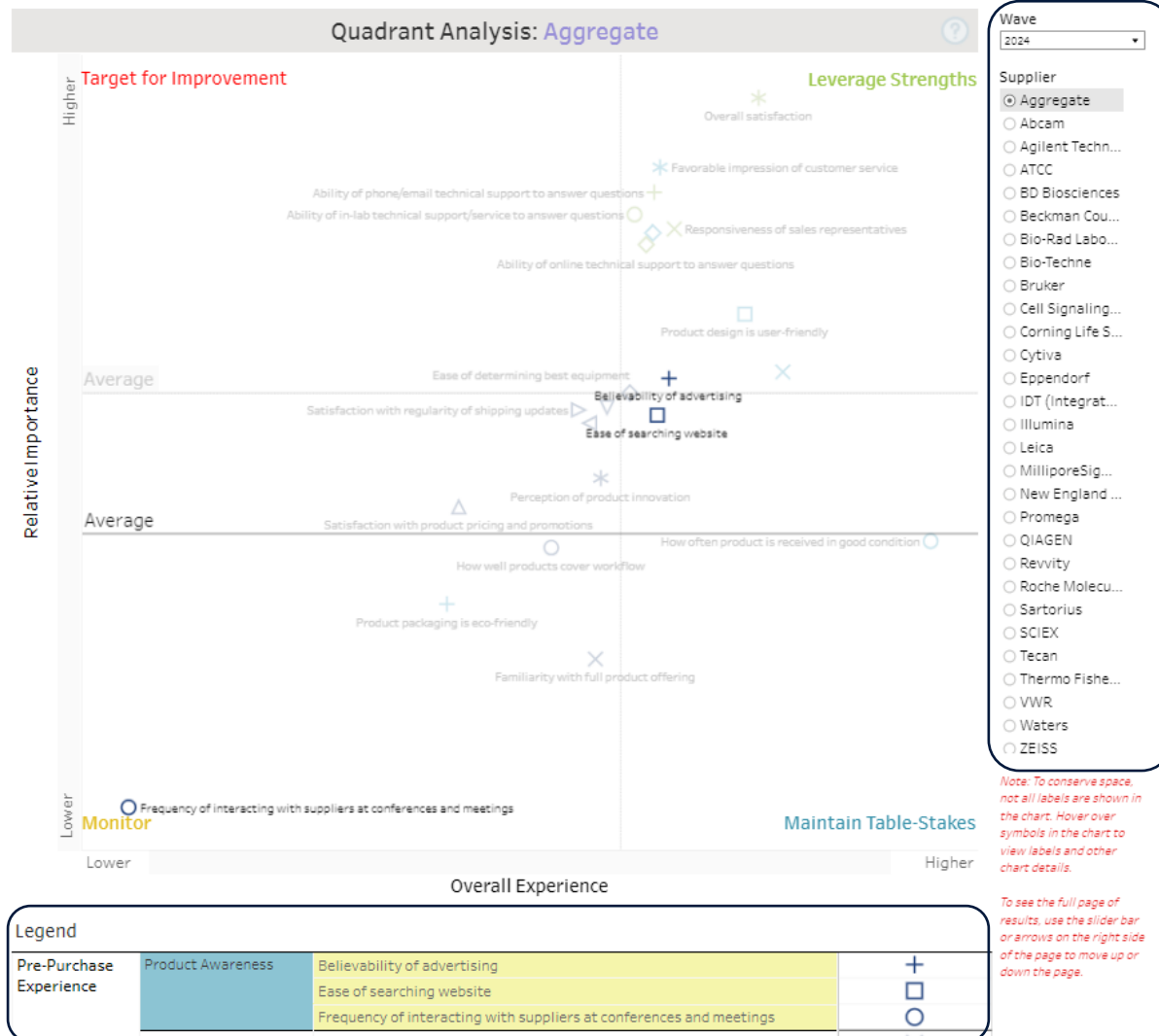


Select touchpoint, segmentation criteria, and waves to view trended performance.

Click on supplier(s) of interest to highlight competitors for benchmarking.

➤ See Tableau 3a. Customer Experience – Trended

# Navigation of Quadrant Analysis

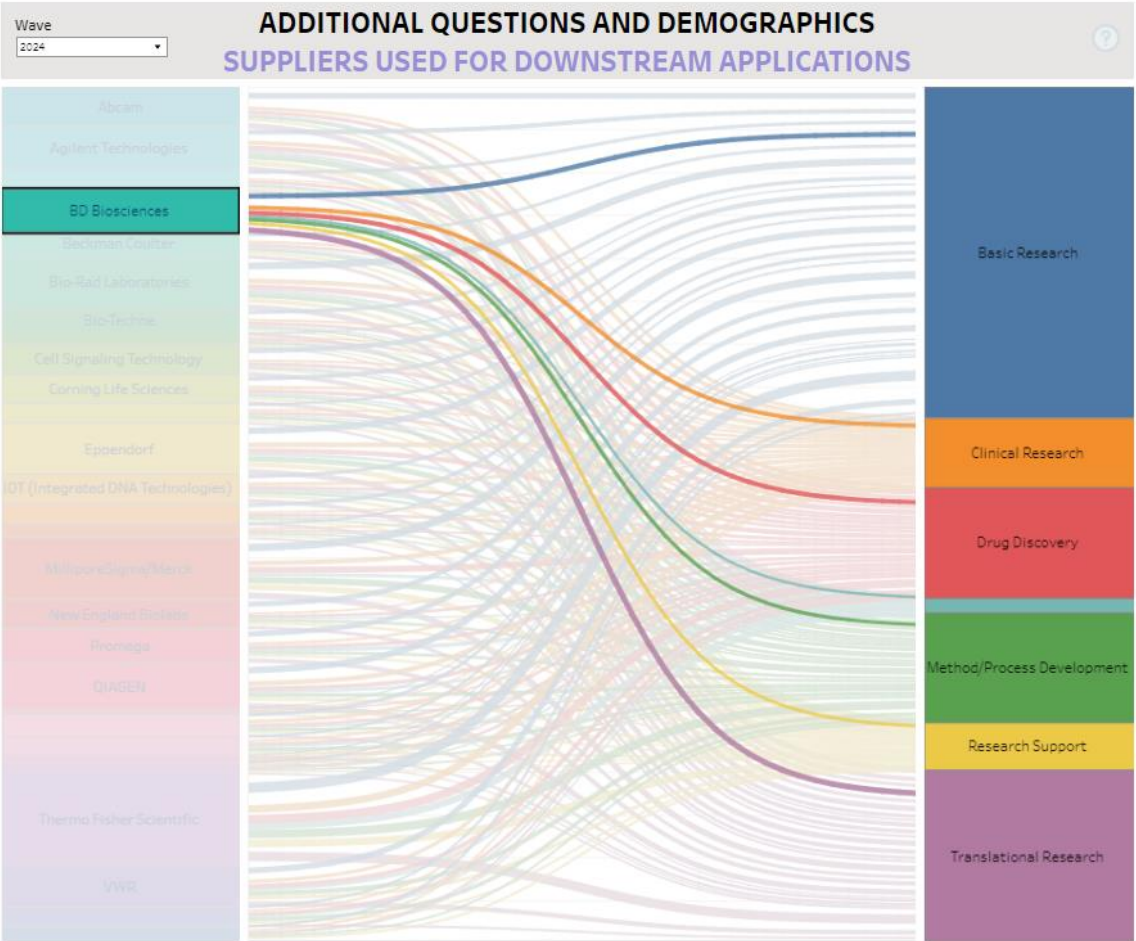


Select wave and supplier of interest to highlight individual supplier performance per year.

Select touchpoints of interest to narrow down display to specific attributes.

➤ See Tableau 5a. Quadrant Analysis

# Navigation of Sankey Diagrams



Select supplier or downstream application to highlight correlation of interest.  
You may also select wave data (top left).  
Hover over lines for more information.  
➤ See Tableau 7f. Suppliers & Applications



A photograph of a speaker at a podium, seen from behind, gesturing with their right hand. The speaker is wearing a dark suit jacket and a headset microphone. The podium has two laptops on it. The background is a large, blurred audience in a conference hall. The entire image is overlaid with a semi-transparent blue filter.

Questions?

# Publications and Reports

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- **Recent Title**

- [2024 Market Report for Research Antibodies](#)
- [2024 Perceptions in Environmental Sustainability in the Life Sciences](#)
- [The Science of Service: Elevating Customer Support in the Life Sciences 2024](#)
- [2024 Customer Loyalty and Switching: Library Prep Kits](#)
- [2024 Digital Marketing & Advertising in the Life Sciences](#)
- [2024 Trends in Conferences & Exhibit Strategies in the Life Sciences](#)

- **Coming Soon**

- 2024 Global Laboratory Research Budgets

# About BioInformatics

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BioInformatics, part of Science and Medicine Group, is **the premier research and advisory firm** serving the life science industry. Since 1994, we have been providing off-the-shelf reports, custom-designed studies, and market analysis that enables companies to understand their market and competitors through the eyes of the most important information source of all the people who buy their products.

By leveraging our online professional network of tens of thousands of scientific customers, we have supported more than 500 companies and provided insights that lead to better business decisions.

Our actionable insights support assessing the size and attractiveness of markets, optimizing product configurations and pricing, validating corporate acquisitions, measuring of customers' brand loyalty, and evaluating of your brand strength and positioning. **We help you grow, adapt, and change in a rapidly evolving market.**

For more information about Bioinformatics' report and service offerings, please visit our website at [www.bioinfoinc.com](http://www.bioinfoinc.com), call 703.778.3080 x19, or email [reports@bioinfoinc.com](mailto:reports@bioinfoinc.com).

For more information on the Science and Medicine Group, please visit our website at [www.scienceandmedicinegroup.com](http://www.scienceandmedicinegroup.com).

## BioInformatics

671 North Glebe Road, Suite 1610  
Arlington, VA 22203

Phone: 703.778.3080  
Fax: 703.778.3081  
[www.bioinfoinc.com](http://www.bioinfoinc.com)



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# About the Authors

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***Danyi Wu, Ph.D.***

***Manager, Scientific Advisory Services***

Danyi leads a team of Project Managers/Science Advisors who manage quantitative and qualitative life science market research studies. Dr. Wu is a molecular biologist by training, with over 5 years of experience in market research. She has led studies spanning market sizing, pricing, product development, and brand assessment.

She holds a BS in Biological Engineering from MIT and a PhD in Biological Sciences from Columbia University.



***Kate Pastrick***

***Senior Data Analyst***

Kate has 18+ years of experience in survey research and analytics.

She holds a bachelor's degree in Marketing, Economics and Business Management Systems from The University of Delaware.



***Elizabeth Hood***

***Manager, Quantitative Research***

Elizabeth leads a team of data analysts who are responsible for analyzing quantitative data, producing data visualizations, and data dashboards. Ms. Hood has over 10 years of experience with complex statistical analysis, data management, and dashboard development.

She holds a bachelor's degree in Sociology and Global Affairs and an undergraduate certificate in Information Technology.



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# Thank you!

## Contact us



info@bioinfoinc.com



703-778-3080



703-778-3081



BioInformatics Inc  
671 North Glebe Road  
Suite 1610 Arlington, VA  
22203  
United States



**AuntMinnie.com**



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