

# 2009 Attendee Demographics

The Clinical Lab Expo in Chicago attracted more lab directors, managers, administrators, supervisors, researchers, GPO executives, and product development specialists than at any other lab show in 2009. The exhibit program included 652 exhibiting organizations occupying 1,877 booths.

## OVERALL REGISTRATION

Total Registration.....	17,638
Scientific Registration.....	9,774
Exhibitor Registration.....	7,864
Countries Represented .....	99

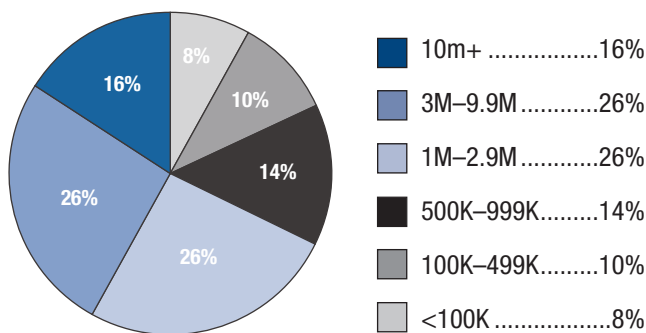
**94% of all 2009 attendees rank the exhibits as their first or second reason for attending.**

## OTHER REASONS FOR ATTENDING (NORTH AMERICAN HOSPITAL DECISION MAKERS)

Learn products/methods.....	53%
Learn clinical implications of tests .....	26%
Learn basic science.....	10%
Learn lab management skills.....	8%
Learn industrial applications.....	3%

## SIZE OF LABORATORY OPERATIONS

North American Labs, Tests per Year

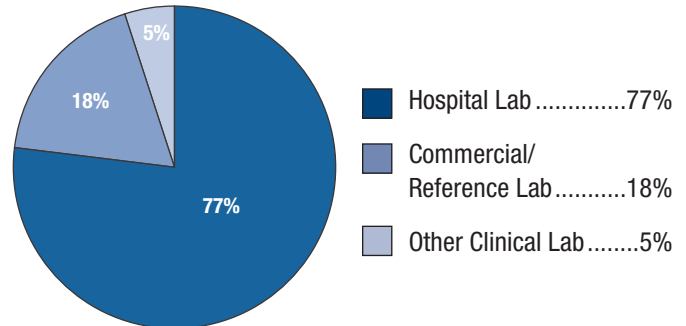


## MANAGEMENT TITLE AND OVERSIGHT

75% of attendees had management or supervisory-level titles.

	North American Attendees	European Attendees
Vice President or Higher	2%	5%
MD/Pathologist	4%	23%
Director/Assist Director	20%	41%
Manager/Chief Tech	26%	15%
Supervisor	22%	10%
Technologist	15%	2%
Other	3%	4%
POCT Coordinator	8%	-

## MEETING ATTENDEES FACILITY OF ORIGIN

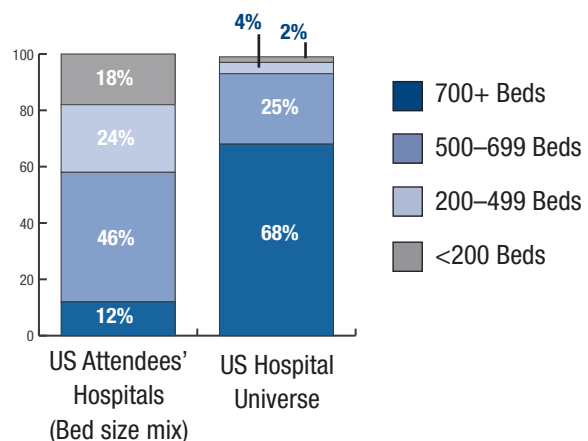


## INDEPENDENT SURVEY PERFORMED ONSITE

Each year, AACC contracts with a highly respected market research company to perform a survey of attendees at the Clinical Lab Expo. This is the 29th performed since 1980. Selected results from the Scientific Registrants who identified themselves as affiliated with hospital or commercial clinical diagnostics are presented here. The 2009 survey was performed by Market Diagnostics International (Dallas, Texas).

## US HOSPITAL BED SIZE

The average hospital bed size represented by attendees was 551.



# 2009 Attendee Demographics *continued*

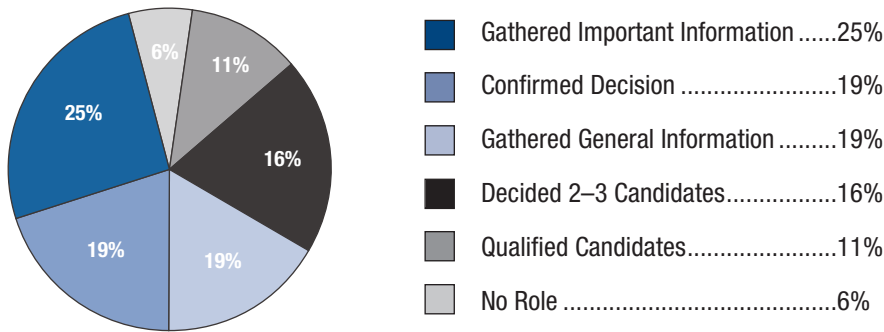
## NUMBER OF ATTENDEES WITH DECISION MAKING RESPONSIBILITIES (select or recommend)

Field: All North American Clinical Attendees

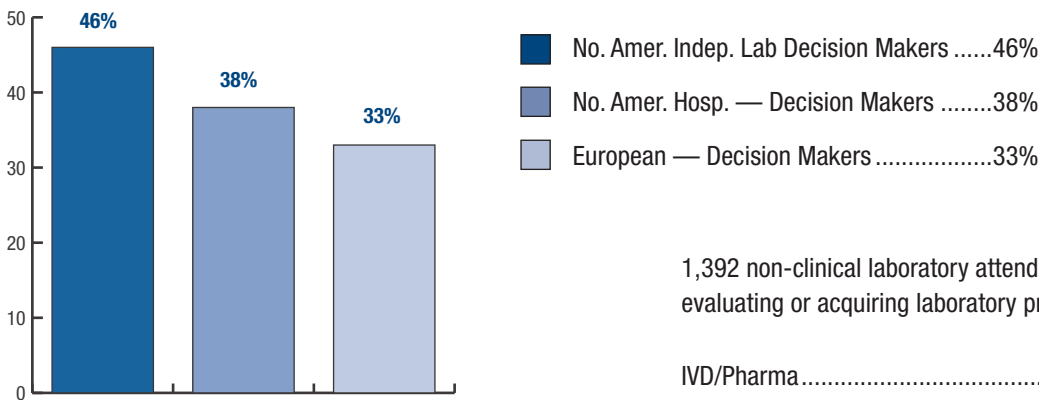
Chemistry Systems	1,745
Immunoassay Systems	1,452
Lab Automation Systems	1,341
Urinalysis Systems	1,239
Hematology Systems	1,148
HPLC	959
Coagulation Systems	902
Lab Information Systems	867
Molecular Diagnostics	664
Microarray/Other Multi-Analyte Systems	590
Automated Micro Systems	581
Flow Cytometers	570

## CONTRIBUTION TO THE PURCHASING PROCESS

Role of Meeting and Expo in North American Decision Maker Purchasing



## CONFIRMED A TENTATIVE PURCHASE OR DECIDED BETWEEN 2-3 CANDIDATES

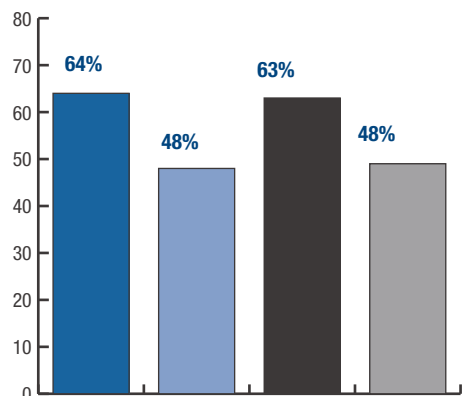


1,392 non-clinical laboratory attendees were present for the purpose of evaluating or acquiring laboratory products.

IVD/Pharma	812
Distributors/Resellers	251
OEM	110
Other	219

# 2009 Attendee Demographics *continued*

## ATTENDEES WITH MULTI-SITE MANAGEMENT RESPONSIBILITY



- No. American Hospital — Decision Makers.....64%
- No. American — All .....48%
- W. Europe — Decision Makers .....63%
- W. Europe — All .....48%

**73% of this year's attendees** had management oversight of one or more functions or sites.

**48% of North American attendees** had responsibility for multiple sites, average 14.0 sites per manager.

**60% of North American attendees** had responsibility for multiple functions (e.g., chemistry, immunoassay, hematology).

- 58%** had oversight of chemistry.
- 37%** had oversight of hematology.
- 18%** had oversight of microbiology.
- 14%** had oversight of molecular diagnostics.

On average, 15.5 functional areas and/or site per North American manager.

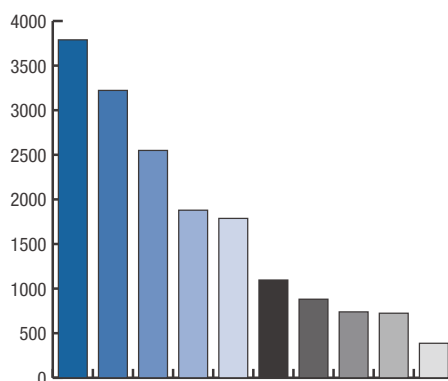
On average, 17.9 functional areas and/or sites per European manager.

## GEOGRAPHIC ORIGIN

- 76%** work in North America
- 7%** work in Western Europe
- 6%** work in Asia
- 7%** work in Central and South America
- 3%** work in Eastern Europe
- 1%** work in Other World Regions (OWR)

## ATTENDEES' ROLE IN INSTRUMENT PURCHASES

Instruments to be Acquired in the Next 24 Months (North America)

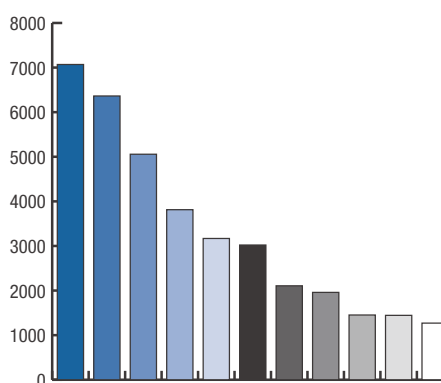


**81% of clinical attendees** anticipate playing a major role in the acquisition of mainframe lab instrumentation and reagents as either final lab decision-maker or recommender.

North American attendees anticipate acquiring 17,053 workhorse analyzers in the next 24 months, **approximately \$1.0 billion in capital equipment.**

- Chemistry Analyzers.....3,789
- Immunoassay Analyzers.....3,222
- Hematology Analyzers.....2,549
- Urinalysis Analyzers.....1,879
- Coagulation Analyzers.....1,787
- GC/Mass Spec Instruments.....1,096
- Molecular Diagnostic Analyzer.....881
- Automated Micro ID/Sens.....739
- Microarray/Multiplex Systems.....724
- Flow Cytometers.....387

## ATTENDEE SITES WITH SYSTEMS IN PLACE DRIVING REAGENT SALES



North American Decision Maker  
**Budget=\$3.1 billion**

**76%** of North American labs have **POCT programs**

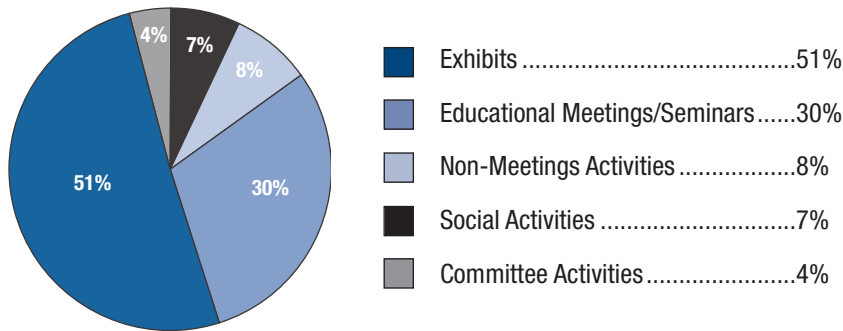
**22%** of North American attendees have decision-making authority for **Lab Information Systems**

- Chemistry Analyzers.....7,069
- Immunoassay Analyzers.....6,363
- Hematology Analyzers.....5,057
- Coagulation Analyzers.....3,813
- Urinalysis Analyzers.....3,168
- GC/Mass Spec Instruments.....3,021
- Automated Micro/ID Sens.....2,107
- Flow Cytometers.....1,959
- Molecular Diagnostic Analyzer.....1,452
- Microarray/Other Multiplex Systems.....1,444
- Lab Automation/Robotics.....1,270

# 2009 Attendee Demographics *continued*

## TIME ALLOCATION ON EXHIBIT DAYS

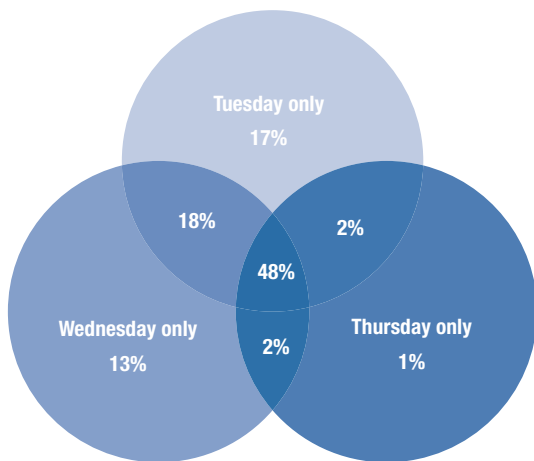
(Decision Makers' Average Time at the Exhibits)



## DAILY ATTENDANCE ANALYSIS

(Attendees spent an average of 10 hours at the Exhibits.)

**Tuesday total 82%**



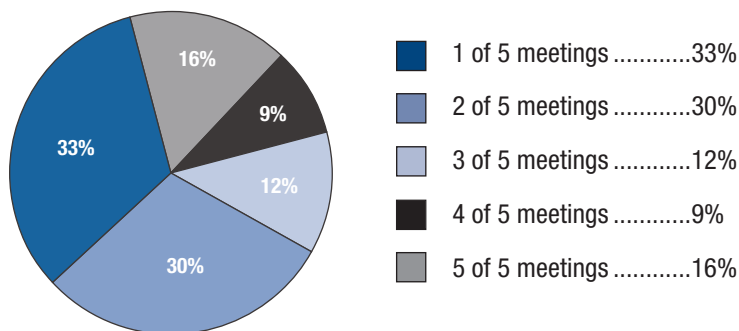
**Wednesday total 81%**

**Thursday total 33%**

**Two or more days 69%**

Each segment is mutually exclusive.

## NORTH AMERICAN ATTENDEES



## 2009 ATTENDEES WHO ALSO ATTENDED THE 2008 EXPO: 36%

### Frequency of Attendance

Approximately one-third (36%) of 2009 attendees attended the 2008 Expo. Only 16% of attendees come every year. You need to exhibit every year to reach all of these decision-makers.

### All Attendees

Present in 2009 and 2008	37%
Present in 2009, not in 2008, but attended two or more meetings in 5 years	28%
Present for the first time in 3 years	35%
<b>Total</b>	<b>100%</b>
"Regular attendees" (3 of 5 meetings)	37%

## PLANNED MEETING ATTENDANCE IN 2009

Will attend:

