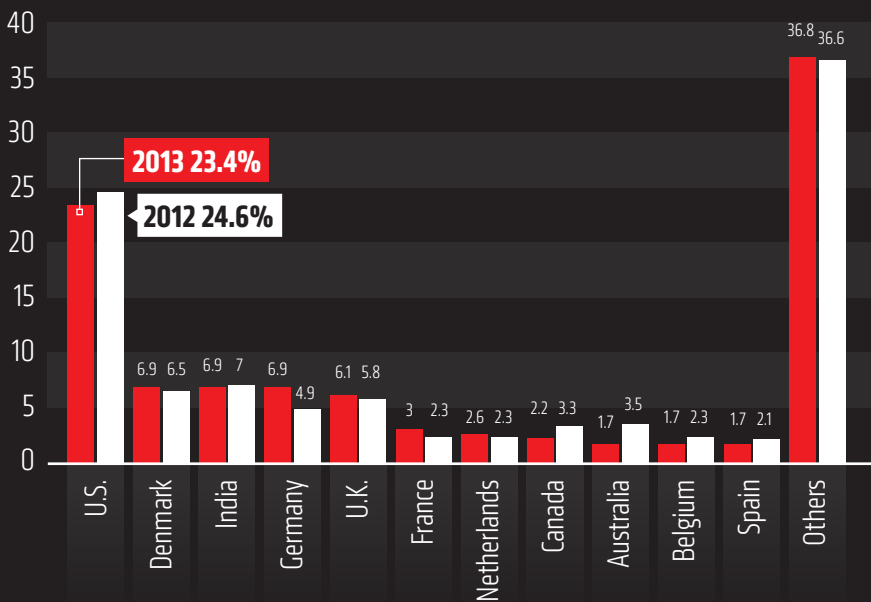


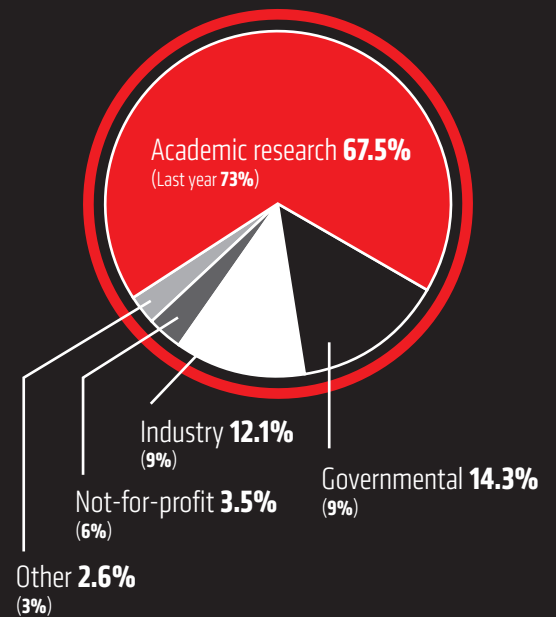
# ANNUAL SURVEY 2013 *Results*

Our 2013 survey on the NGS market was completed by 231 respondents, and provides a good summary of the NGS market.

Response rate (%) per country



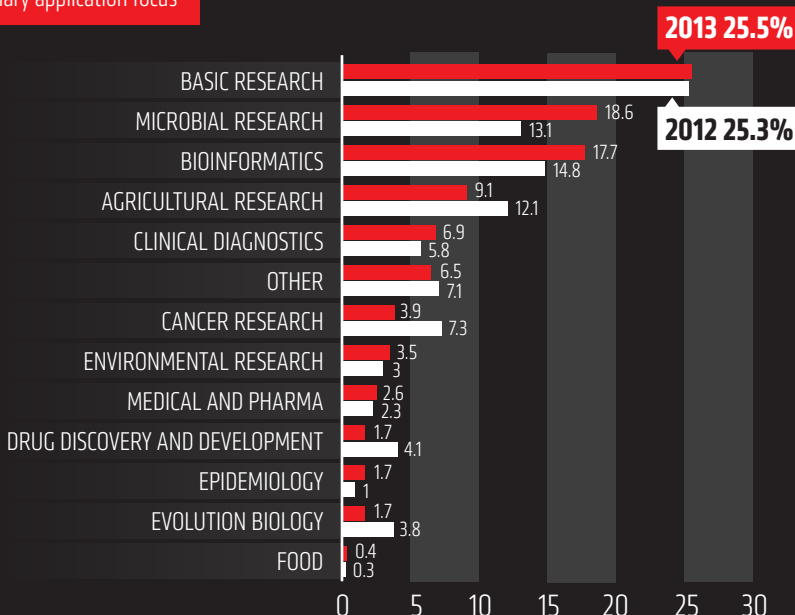
Type of organization



**Response rate:** U.S. on top with 23.4% (2012: 24.6%)

**Organization type:** 7.5% decrease in response from Academic organizations; 37.1% increase in Governmental; 25.6% increase in Industry

Primary application focus



## WHAT DO PEOPLE WORK WITH?

**Primary application focus:** Basic research (25,5%), followed by Microbial research (up by 29.6% from 2012), and Bioinformatics (up by 16.4% from 2012)

**Extra info:** Agricultural decreased 24.8%; Cancer research fell 46.6%

**86%** of respondents have a job that includes NGS analysis. This is more positive compared to 2012, when it was **73%**. In 2011, the number was only **57%**

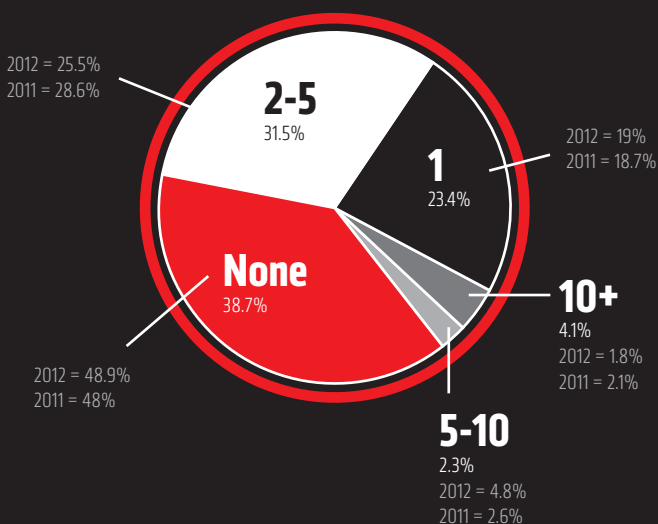
NGS technologies in use (multiple answers allowed)

# ILLUMINA CONTINUES DOMINANCE

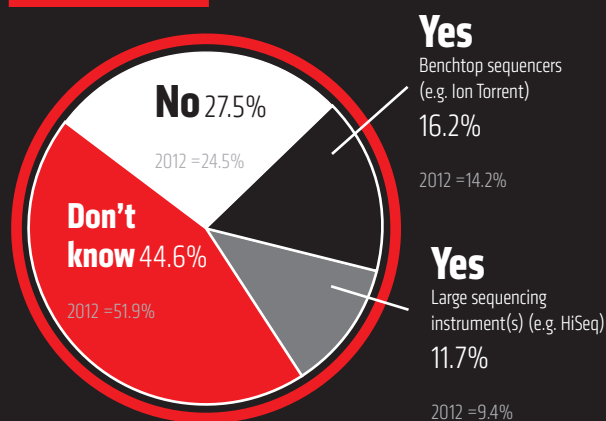
**Summary:** Chart shows 2013 figures and % change compared to 2012; LifeTech - Ion Torrent PGM climbs to 3rd place, from 6th last year

1. Illumina - HiSeq	44.1%	▲ 21.5%
2. Illumina - MiSeq	36.0%	▲ 40.8%
3. LifeTech - Ion Torrent PGM	24.3%	▲ 52.7%
4. None	23.0%	▼ 33.9%
5. Roche 454 - GS FLX	21.2%	▶
6. Illumina - GA 2	12.2%	▼ 19.2%
7. Complete Genomics	10.8%	▼ 1.8%
8. PacBio RS	10.4%	▲ 51%
9. LifeTech - SOLiD	9.5%	▲ 3.1%
10. LifeTech - Ion Proton	9.0%	▲ 72.2%
11. Roche 454 - GS Junior	7.2%	▲ 2.8%
12. Other	3.2%	▼ 17.9%

In-house NGS instruments (inc. 2012/11 results)



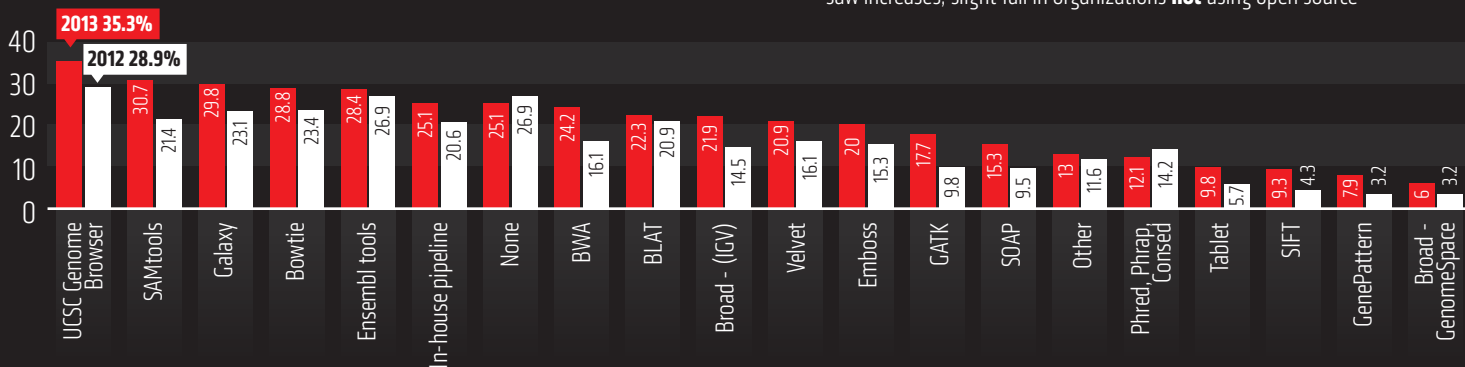
Plan to buy in 2014



**Summary:** Number of organizations with no instruments saw a 20.9% drop from 2012-2013; organizations with 1, 2-5, and 10+ instruments rose 18.8%, 19%, and 56.1% respectively; 27.9% of organizations plan to buy more NGS machines in 2013 compared to 23.6% in 2012

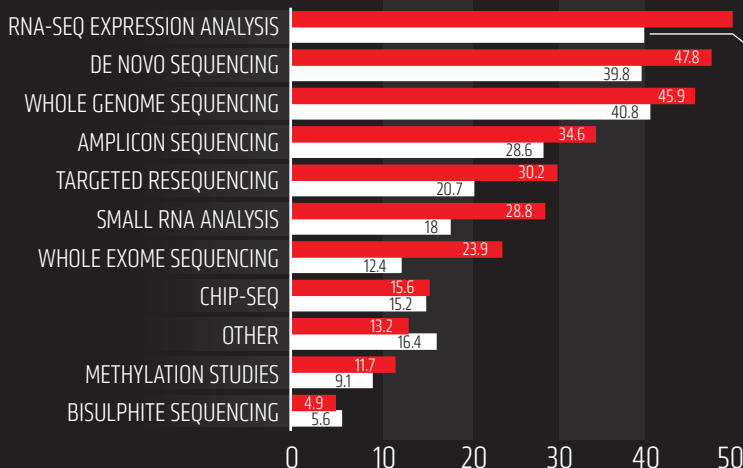
Preferred open source tool (multiple answers allowed)

**Summary:** UCSC Genome Browser still top; SAMtools up 30.3% from 2012; majority saw increases; slight fall in organizations **not** using open source



Primary application focus

**Summary:** RNA-Seq Expression saw a substantial rise of 20.1% and takes first spot, held by Whole Genome Sequencing last year; De novo Sequencing saw a 16.7% increase, and moves into second place



2013 50.2%

2012 40.1%

**79%** of organizations have access to bioinformaticians  
2012 = 73%  
2011 = 43%