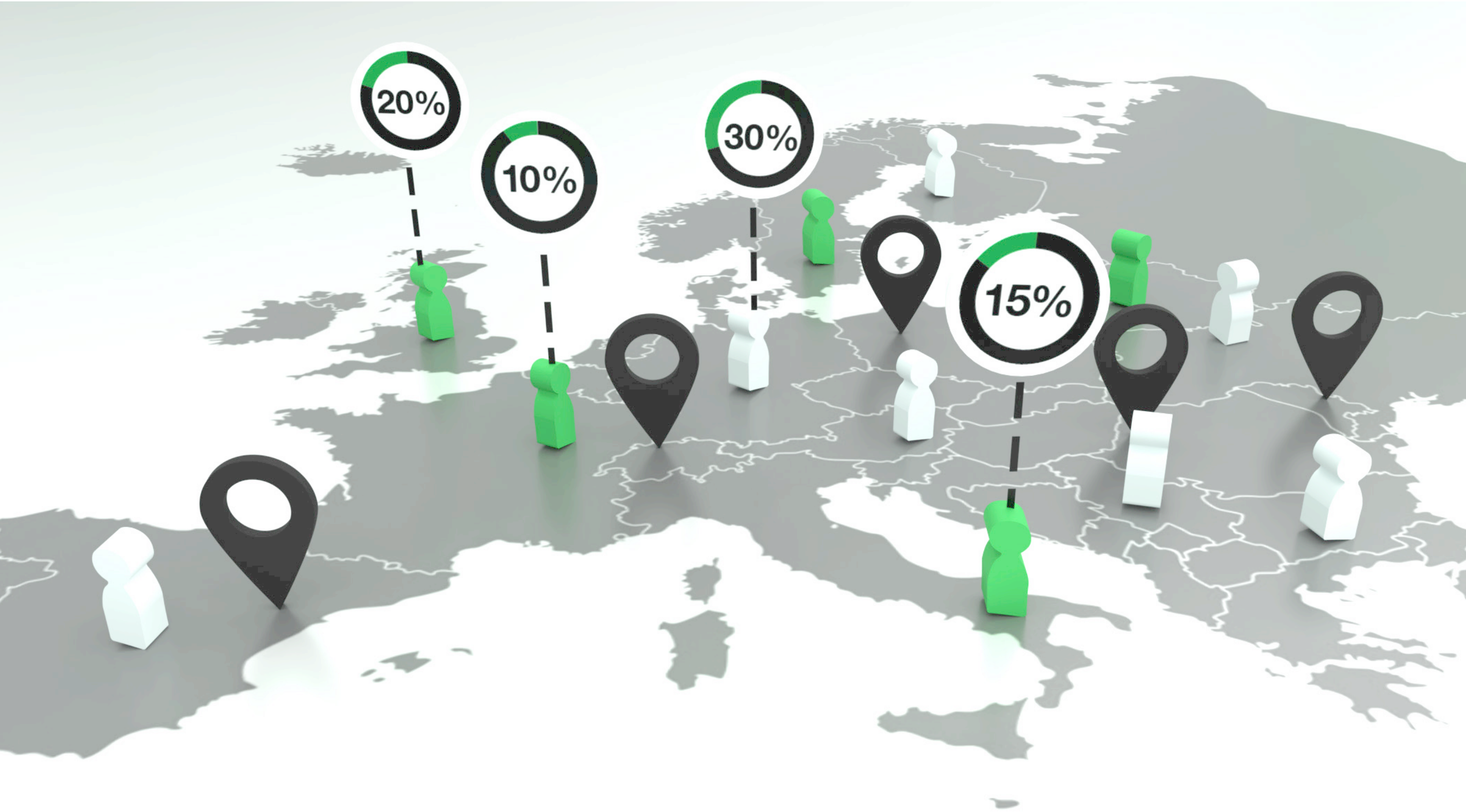


SHAPING THE PROCUREMENT FUTURE

Key Insights from Buyers

CONTENTS

EXECUTIVE SUMMARY

This report provides an in-depth analysis of the attitudes and purchasing strategies of buyers in the electronic components market who utilise eCommerce platforms. It segments respondents by the primary purpose of their purchases—whether for maintenance, research and development (R&D), or production—as well as by company size, offering a comprehensive view of how different organisational needs influence buying behaviour.

The research uncovered many interesting insights into what matters most to today's B2B buyers, including:

- The high level of autonomy enjoyed by these buyers, indicating a shift toward more self-directed procurement processes.
- The limited use of automation in purchasing workflows, suggesting significant room for efficiency improvements through technology adoption.
- At the time of the survey, respondents emphasised the critical importance of price and product availability as primary factors influencing their choice of distributors, underscoring the market's competitive nature.

The research is based on a sample of 941 buyers from across Europe, representing a diverse range of industries and company sizes. The survey was conducted between May and July 2024, ensuring that the findings reflect the most current market dynamics.

This report enables benchmarking of purchasing processes by revealing the current state of eCommerce buying in the electronic components sector. It also serves as a valuable resource for suppliers and channel partners looking to align their strategies with buyer expectations and emerging trends.

WHO ARE THE BUYERS OF ELECTRONIC COMPONENTS?

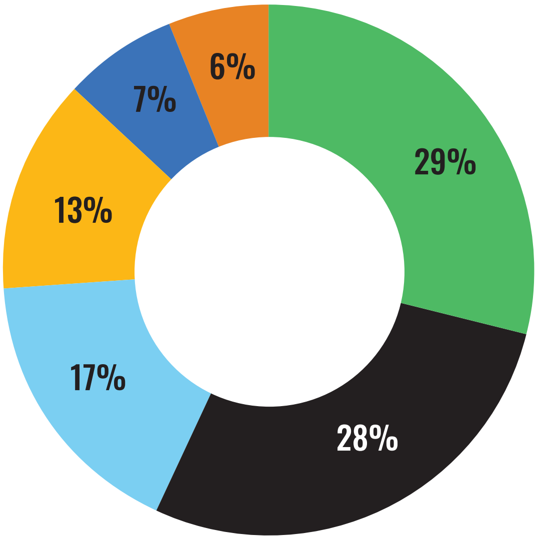
REASONS FOR PURCHASE

The research identified three primary segments of electronics components buyers, based on their reasons for purchasing. Most of the buyers – 93% – who responded to the survey purchased for one of three primary reasons. The largest group, 42% of the sample, mainly purchased for production, an environment where ensuring that supply chains are efficient to enable manufacturing lines to run continuously is critical.

This was closely followed by those who purchased for research and development, representing 40% of respondents. These purchasers generally procure lower volumes of components for innovation, prototyping and testing. Maintenance was the third largest group, with just 11% of respondents in this category. Typically this requires low volumes of components to be sourced in a short timeframe to enable repairs and upgrades to equipment. Only 1% bought for education, with the remainder purchasing for various other reasons.

THE HIGH-FREQUENCY BUYERS

In addition to having different reasons for making a purchase, the buyers could be segmented based upon the frequency of purchases that they made. About a quarter of the buyers (26%) were classified as high-frequency purchasers because they place one or more orders each day. This suggests that their role was primarily purchasing, whereas other less-frequent purchasers were likely to also undertake other roles as part of their jobs.



Those who purchased for maintenance were more likely to order frequently, with 36% ordering daily, although a similar proportion of production purchasers (35%) also made one or more orders per day. This reflects the fast-paced environments of production and maintenance, where delays and downtime result in significant costs to the business. In contrast, buyers focused on R&D purchased far less frequently, with only 14% placing one or more orders per day. The R&D environment typically has fewer immediate needs for products, and many R&D engineers, rather than professional procurement teams, will make some or all of the purchases required for prototyping, testing and research.

SEGMENTING THE BUYERS

These insights highlight the diversity of buyer behaviours and frequencies, driven by their unique requirements. It is clear that ecommerce buyers have diverse roles and therefore will have different demands for suppliers. Understanding these nuances can help suppliers tailor their offerings and improve service delivery for each segment.

THE RACE AGAINST TIME: WHY SHORT LEAD-TIMES ARE NON-NEGOTIABLE

The Critical Need for Short Lead Times

Most buyers were under pressure to source components with short lead-times. Of those surveyed, 49% reported that they required lead times of less than a week, while 81% needed to source products in two weeks or less.

This highlights that quick access to components is not a luxury but a necessity for most buyers, reflecting the challenging environments in which they operate.

It's important to note that even purchasers who placed orders less frequently still required short lead times, so ensuring stock is available is a key success factor for ecommerce suppliers.

R&D Buyers Face Greater Time Sensitivity

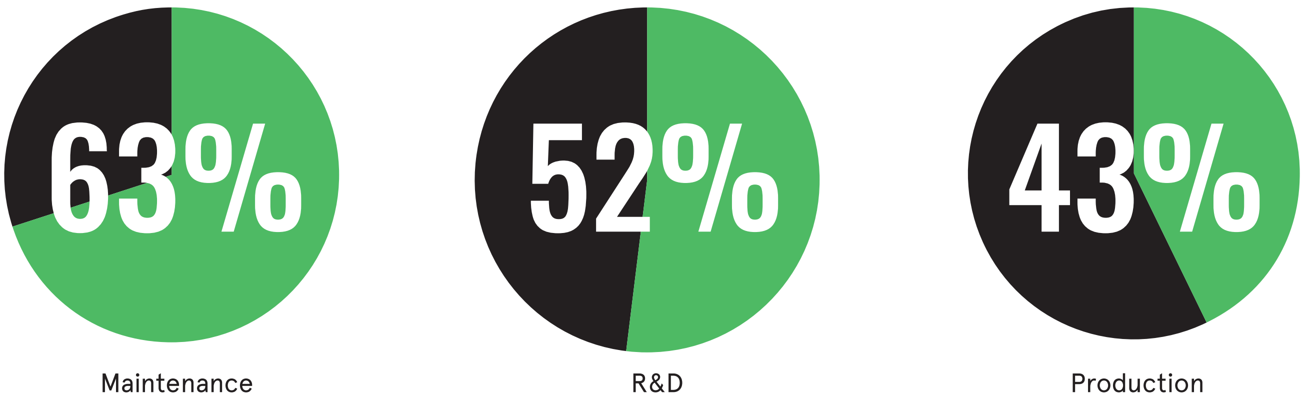
Those purchasing for R&D had less opportunity to plan ahead, compared to those buying for production. Specifically, 52% of R&D purchasers needed to be able to source components in less than a week, while 86% of R&D purchasers needed components in two weeks or less. The unpredictable nature of R&D and the commercial pressure to shorten product development cycles are likely drivers of the requirement for short lead times in this segment, and it further illustrates that even occasional purchasers will need products to be delivered quickly.

Lead Time Pressure Across High-Frequency and Low-Frequency Buyers

The buyers who placed orders most frequently reported lead time requirements that were nearly identical to those of the entire survey sample. This suggests that full-time buyers experience the same lead time pressures as part-time buyers. Rapid fulfilment is therefore a requirement for all segments of ecommerce purchasers, and is likely to be a key reason for a supplier to be selected.

Reasons for Purchase Influences Requirements for Lead Time

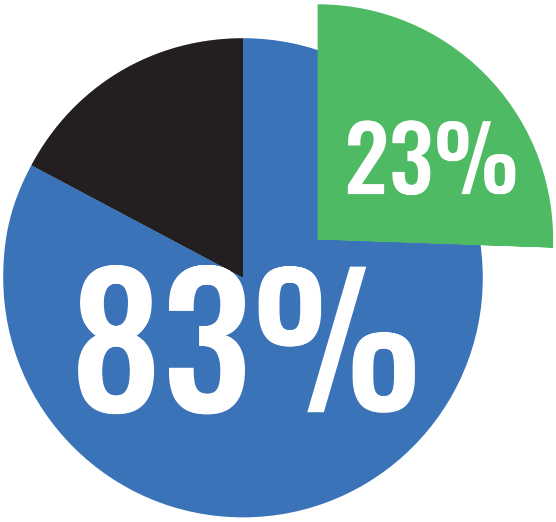
In summary, maintenance and R&D buyers exhibit the greatest need for short lead times due to the reactive or project-based nature of their work. Production buyers, while often under time constraints, may have slightly more predictability in their procurement schedules, allowing them to order further in advance.



Buying for Maintenance and R&D Usually Requires Lead Times of Less than 1 Week

BUYERS GO DIGITAL: ONLINE QUOTES DOMINATE PURCHASING PREFERENCES

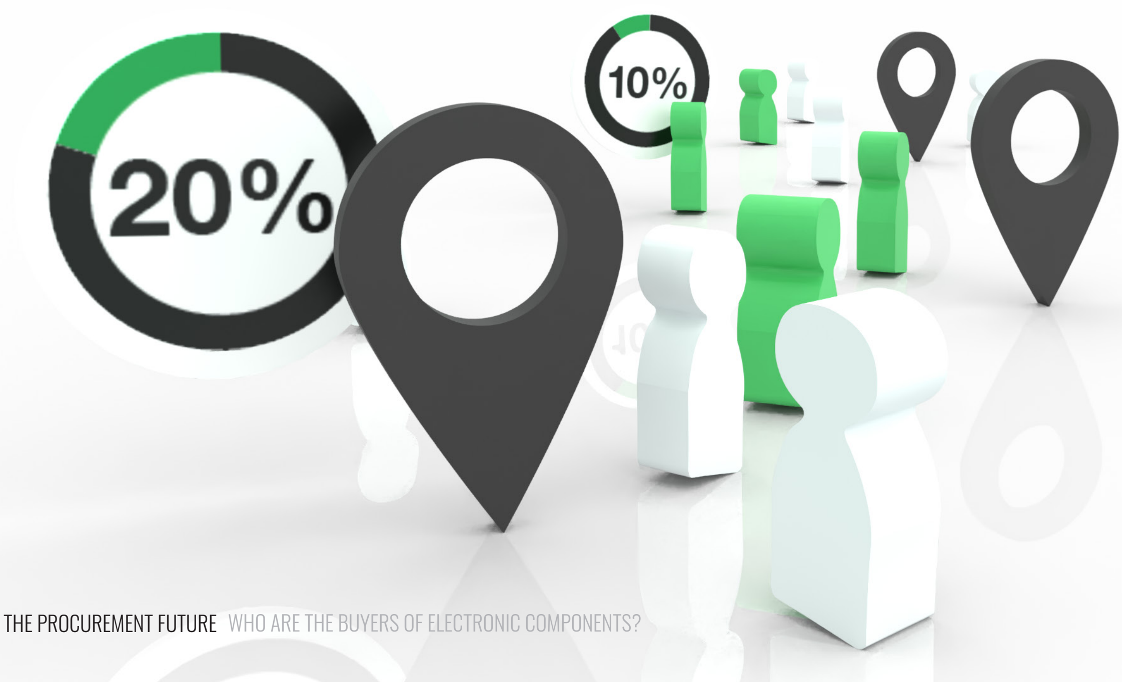
The vast majority of buyers prefer to get pricing information online, with only 17% choosing to ask for a quotation. Even when buying for production, where higher volumes might warrant special pricing, just 23% ask for a quotation first. This reflects a desire for convenience, speed, and transparency when purchasing from ecommerce vendors.



83% check prices online
23% ask for a quotation first

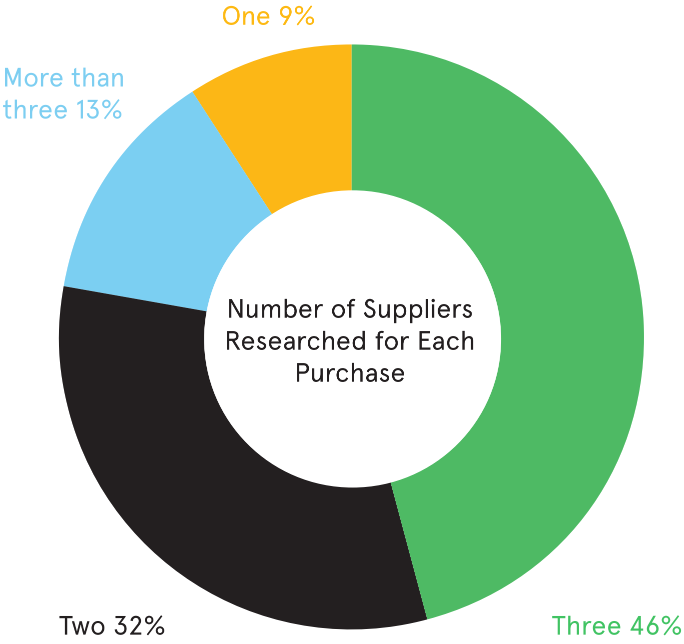
This research shows some strong trends across the purchasing community. The three primary themes driving the use of online pricing are:

1. **Convenience and Efficiency Drive Buyer Preferences:** Buyers are prioritising speed and simplicity in the purchasing process, opting for self-service tools over time-consuming quotation requests.
2. **Digital Adoption Across Buyer Segments:** The trend underscores the increasing importance of digital solutions in the electronic components market, as even production buyers—typically associated with bulk purchasing—show limited reliance on formal quotations.
3. **Opportunity for Improved Quotation Systems:** The low uptake of quotation requests suggests that traditional methods may feel outdated or cumbersome to buyers. Suppliers could benefit from modernising and integrating online quotation systems into their platforms to bridge this gap.



PRICE AND AVAILABILITY DRIVE COMPETITIVE DISTRIBUTOR SELECTION

The survey highlights how critical price and availability are when buyers choose a distributor. Buyers prioritise cost-effectiveness and the ability to source components quickly and reliably. Although the survey was run at a time when component supply chains were struggling, it is clear that distributors who can consistently offer competitive pricing and adequate stock hold a clear advantage in the market.



WIDESPREAD COMPARISON SHOPPING

Most buyers compare multiple distributors for stock and price quotes. In fact, 59% of purchasers seek quotes from three or more vendors, while a small minority of buyers – only 10% – are satisfied with a single quote. This clearly suggests that loyalty to one distributor or supplier is rare unless they offer consistently superior terms.

The research shows that the electronics components ecommerce market is challenging for suppliers as purchasers are willing to spend time to secure the best deal for every purchase. There are three key themes driving the extensive use of comparison shopping:

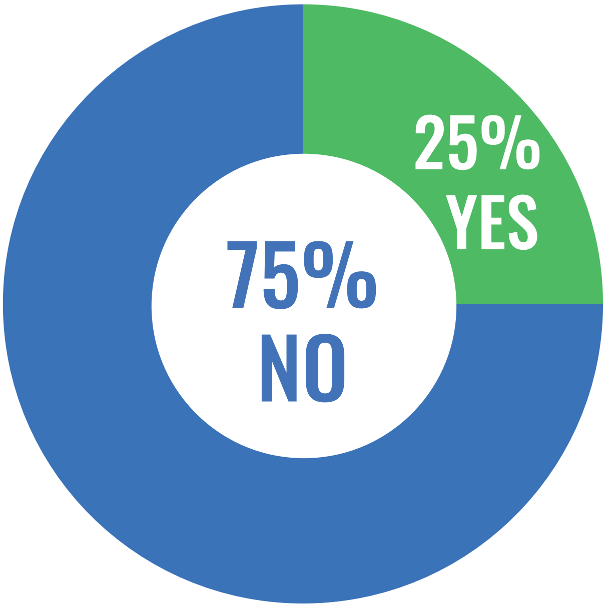
1. **Buyers are Savvy and Informed:**
   - With tools and platforms available to compare stock and pricing, buyers are taking a deliberate and informed approach to procurement.
   - Distributors must stay competitive not just on price but also on the speed and transparency of their service.
2. **Competition is Intense:**
   - The fact that most buyers seek multiple quotes underscores the importance of differentiation among distributors.
   - Beyond price and availability, other factors like customer service, delivery times, and reputation could influence final decisions.
3. **Limited Vendor Loyalty:**
   - The low reliance on a single distributor indicates that buyers are flexible and willing to switch providers if it benefits their bottom line or timelines.

LIMITED IMPLEMENTATION OF TOOLS AND TECHNOLOGY AMONG PURCHASERS

Despite the increasing complexity and demands of sourcing electronic components, buyers are not leveraging tools and technology to streamline their processes. This reluctance to adopt available solutions is evident across various purchasing activities.

LOW USAGE OF BOM UPLOADING TOOLS

The process of sourcing components often involves cross-referencing multiple suppliers for stock availability and pricing. However, few purchasers are taking advantage of tools like BOM (Bill of Materials) uploading, which could simplify and accelerate their workflow. Even among the hard-pressed high-volume purchasers who make multiple purchases per day, only 29% upload BOMs. For lower-volume buyers, the adoption rate is even lower. This low level of adoption of BOM upload tools is surprising as it offers purchasers significant potential time savings.



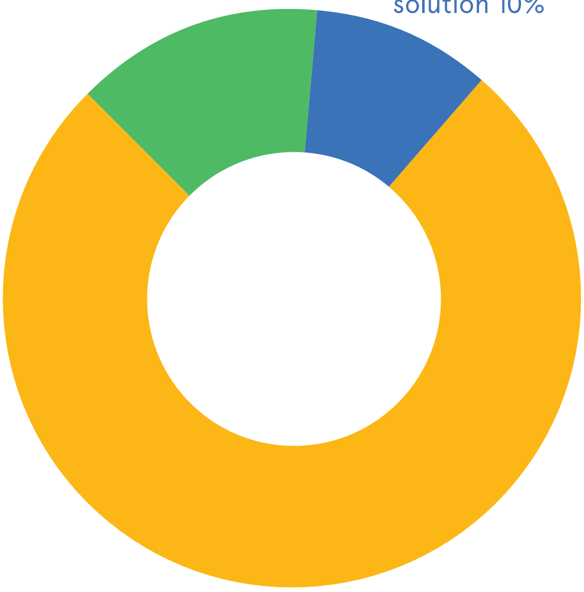
Most Purchasers Don't Upload BOM

Although the survey did not ask specifically why purchasers chose not to use BOM tools, there are three reasons that are likely to be driving a reluctance to embrace time-saving technology:

- **Lack of Awareness:** Purchasers may not be familiar with how BOM tools work or the benefits they offer.
- **Perceived Complexity:** Buyers might see BOM uploading as time-consuming or difficult to set up, despite its efficiency for recurring purchases.
- **Trust Concerns:** Buyers might hesitate to share sensitive BOM details with distributors due to concerns about intellectual property or privacy.

MINIMAL ADOPTION OF EPROCUREMENT SYSTEMS

The lack of interest in automation is also reflected in the low uptake of eProcurement systems. Only 14% of the respondents currently have an eProcurement system, and only a further 10% are considering adopting one. This leaves the vast majority – around three quarters of purchasers – with no plans to use eProcurement technology.



eProcurement Adoption is Low

CHALLENGES IN EPROCUREMENT ADOPTION

There are a number of challenges that have been shown to limit the adoption of eProcurement systems. These are:

- **High Implementation Costs:** Smaller companies may lack the budget to invest in eProcurement systems.
- **Integration Issues:** Existing processes or legacy systems might not be easily compatible with newer technology.
- **Limited Awareness or Training:** Buyers may not fully understand the potential ROI or benefits of eProcurement tools in terms of cost and time savings.

THE CONSEQUENCES OF AVOIDING AUTOMATION

The low adoption of these tools and systems suggests that buyers are relying on manual processes, which could result in:

- **Inefficiency:** Manually checking multiple distributors and managing orders increases the workload, especially for high-volume purchasers.
- **Higher Costs:** A lack of automation may prevent buyers from identifying the best deals quickly, leading to missed opportunities for savings.
- **Error-Prone Processes:** Manual entry and tracking of BOMs and purchase orders increase the likelihood of errors, which can disrupt production timelines or lead to excess inventory.

LARGE ORGANISATIONS ARE LEADING THE WAY IN EPROCUREMENT ADOPTION

Despite its potential to transform purchasing processes, the adoption of eProcurement solutions remains limited, particularly among smaller companies. However, the data suggests that larger organisations are leading the way in integrating these systems into their workflows.

In companies with more than 500 people, 45% already use eProcurement and a further 9% are considering implementing the technology. This suggests that larger organisations, which typically manage larger purchasing teams and higher purchasing volumes, recognise the efficiencies and cost savings eProcurement offers.

There is a diverse range of eProcurement systems being either adopted or considered. The most popular option is SAP/Ariba, which has penetrated 15% of the respondent base. Following this, an in-house system is the second most popular choice, with 10% of respondents developing their own solution. This reflects the fragmented nature of the eProcurement market, as businesses choose tools that align with their unique needs.

The range of eProcurement solutions identified in the study reflects the market share seen in other research. A recent report (Pang, A, Markovski, M and Ristik, M;, 10th June 2024) also found the market for eProcurement to be fragmented, with the top 10 vendors accounting for only 52.6%. They also found that SAP/Ariba was the market leader with a 25.4% market share.

POTENTIAL FOR EPROCUREMENT GROWTH

Interestingly the report by Pang et. al identified a CAGR for the industry of just 2.8%. A much higher growth rate of 9.92% was forecast by Mordor Intelligence in their Procurement Software Market Size & Share Analysis - Growth Trends & Forecasts (2024 - 2029) report (Mordor Intelligence, 2024).

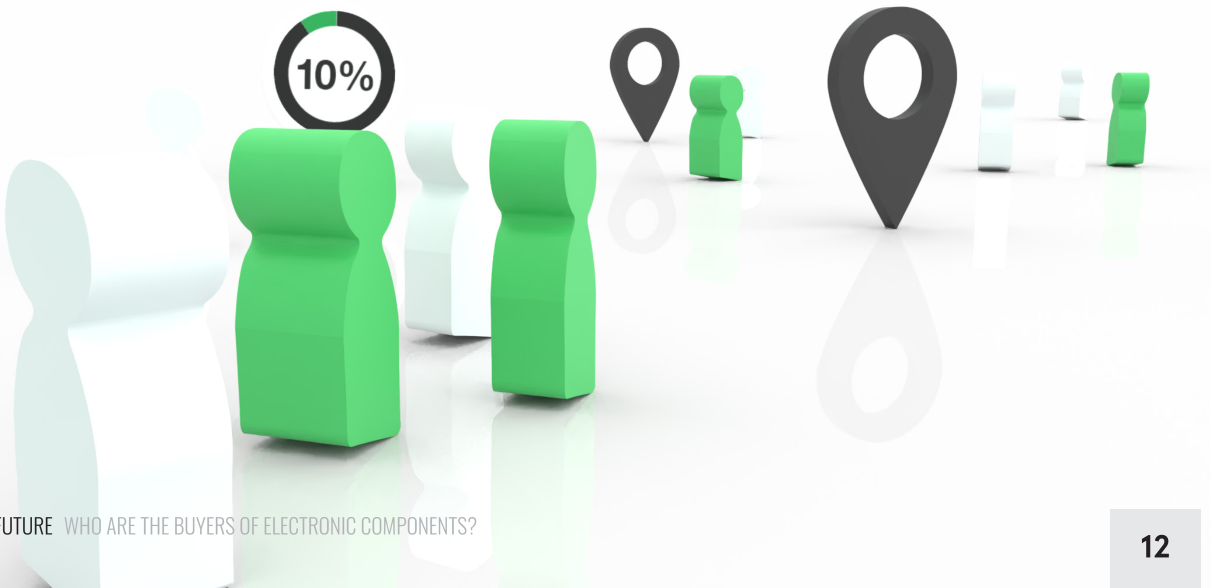
The respondents in this study suggest that an even faster growth rate could be seen in the electronics eProcurement market as 10% of the respondents were considering implementing a solution: a significant number considering only 14% had already deployed the technology.

This higher growth projection that can be inferred from the number of purchasers in the survey who are considering deploying the technology reflects the rising awareness of digital transformation and the increasing pressure on businesses to streamline procurement.

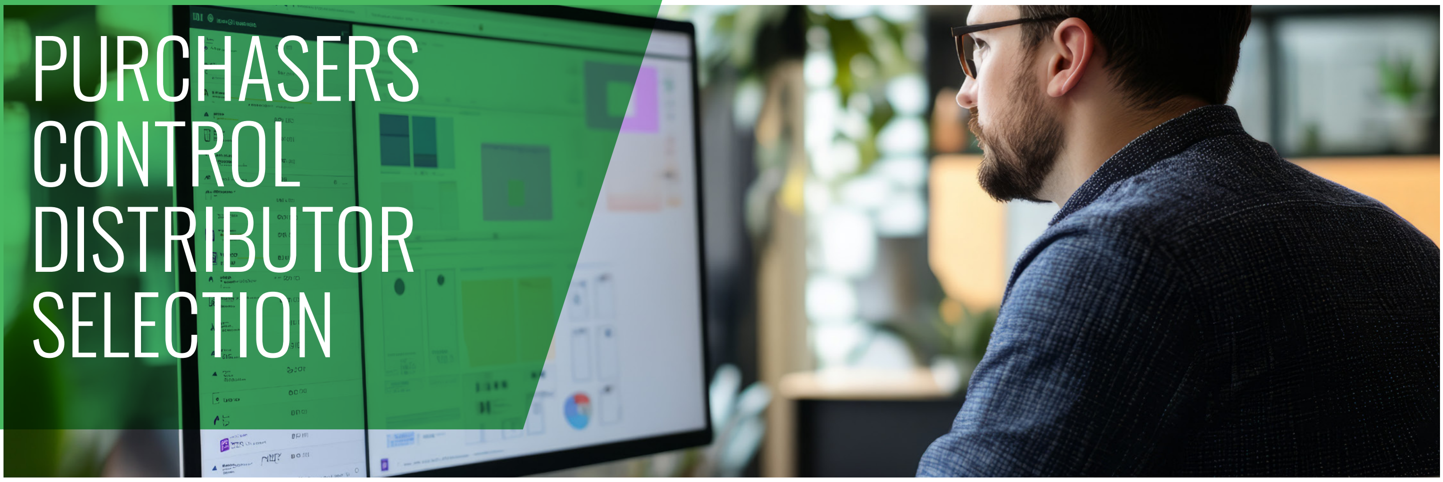
eProcurement is clearly growing in adoption and is already being adopted by the majority of larger companies who purchase from ecommerce electronics components distributors. This will have significant implications for the industry:

1. **Larger Organisations are the Early Adopters:**
    - The higher adoption rates among larger companies signal that smaller businesses may follow suit as eProcurement tools become more accessible and affordable.
2. **Fragmented Market Offers Opportunities:**
    - The lack of a dominant provider beyond SAP/Ariba creates room for innovation and competition, particularly among niche or customisable solutions.
    - In-house systems, chosen by 10% of respondents, highlight the demand for personalised features that standard platforms may not offer.
3. **The Need for Simplification:**
    - Smaller companies are deterred by the complexity or cost of eProcurement systems. Offering scaled-down or modular solutions could help bridge the gap.
4. **Accelerating Awareness:**
    - Vendors must emphasise the ROI of eProcurement through case studies, targeted marketing, and pilot programs to attract hesitant companies.

The adoption of eProcurement remains in its initial stages, but larger companies are setting a precedent for the industry. With an increasingly fragmented market and varying growth projections, the potential for expansion is significant, particularly if vendors address the needs of smaller businesses and highlight the tangible benefits of automation.



PURCHASERS CONTROL DISTRIBUTOR SELECTION



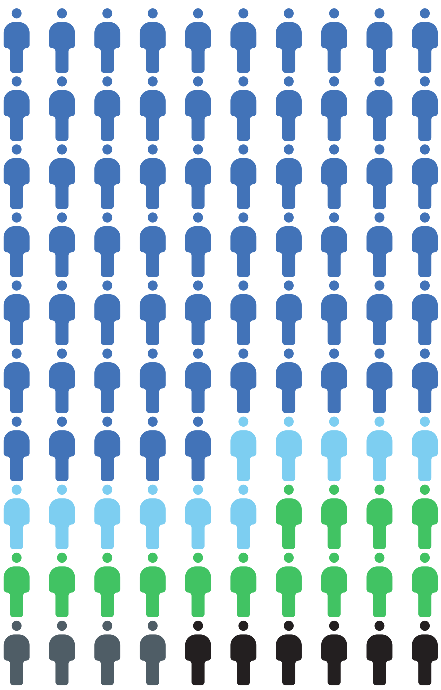
Research highlights the significant autonomy granted to purchasers in selecting distributors and sheds light on the diversity of approval processes within companies of varying sizes. These findings underline the decentralised nature of procurement decisions, especially in smaller organisations, and reveal areas where standardisation and efficiency could be improved.

PURCHASER AUTONOMY IN DISTRIBUTOR SELECTION:

Overwhelmingly, purchasers or purchasing processes are responsible for the selection of distributors, with personal choice being a primary factor. The majority of companies (65%) leave the decision to the buyer, while only 18% of buyers surveyed were required to choose distributors from an approved supplier list. This shows that the personal discretion and experience of the buyer is the driving force in vendor selection, and signals that rigid procurement guidelines are the exception rather than the norm.

Engineers are not particularly powerful in determining which distributor to use, having the authority in only 11% of the companies surveyed. Although the engineers will be responsible for defining the technical requirements and typically selecting the component to be used, they are not a significant influence in the vendor from which the component is purchased.

Small company owners rarely play a direct role, determining the vendor to be used in only 2% of cases, highlighting a hands-off approach in delegating purchasing responsibilities.



Who Chooses the Distributor

DIVERSITY IN PURCHASE ORDER APPROVAL PROCESSES

The survey revealed that there is not a consistent process to approve purchase orders. More than one third (37%) of respondents had no approval process, although this varied dramatically by company size. The percentage, however, is a striking figure given the potential financial implications of procurement.

In the smallest companies with fewer than 50 people, 54% had no formal approval process, reflecting limited resources and a need for agility in decision-making.

Only 8% of the largest companies, those employing more than 500 people, lacked a formal approval process. This indicates that the larger companies have a far more structured purchasing process, and a more mature procurement function.

Where there is no formal approval process, respondents in companies of all sizes were split approximately equally between:

1. **Always requiring a purchase order to be raised**
2. **A senior purchaser signing off on orders, either universally or for transactions above a certain value**
3. **Other alternative systems**

This inconsistency persists across companies of all sizes, indicating that approval methods are tailored to internal workflows and priorities, and that there is no clear industry-wide standard.

IMPLICATIONS FOR BUSINESSES

The research has shown a decentralised approach to distributor selection, with purchasers playing a leading role. While this autonomy offers flexibility, it also highlights the need for standardisation to mitigate risks and improve procurement efficiency. Similarly, the diversity in approval processes suggests that many companies, particularly smaller ones, could benefit from implementing scalable, structured systems to balance agility with control.

Businesses should consider the benefits of a more structured approach when purchasing from ecommerce distributors, including:

1. **Optimisation of Distributor Selection:**
   - The high level of autonomy among purchasers suggests potential variability in distributor performance and pricing. Standardizing selection criteria or incorporating tools like vendor management systems could help ensure consistency and cost efficiency.
2. **Standardising Approval Processes:**
   - For smaller companies, the lack of formal approval processes may lead to inefficiencies or increased risk of errors and overspending.
   - Implementing scalable approval frameworks could streamline procurement while maintaining flexibility for smaller teams.
3. **Empowering Engineers Strategically:**
   - While engineers currently play a minimal role, involving them in distributor selection for specialised components could improve alignment between technical requirements and purchasing decisions.
   - Enabling engineers to have more influence over the choice of distributor will reward the suppliers that offer intangible technical benefits such as support, ensuring that the company selects the supplier that offers the best overall value.

CONVENIENCE AND COST: KEY DRIVERS IN DISTRIBUTOR SELECTION

The primary factors influencing buyers' distributor choices, offer valuable insights into purchasing priorities. The results are particularly relevant during a period of global supply chain instability, as was the case when the survey was conducted.

DOMINANCE OF PRODUCT AVAILABILITY

The research was conducted at a time when product availability was limited, largely due to the impact of the aftermath of the global pandemic and the uncertainty regional conflicts had on supply chains, so unsurprisingly availability was ranked as the most important factor in making the decision.

99% of all respondents, and 100% of high-frequency purchasers, identified availability as an important factor. It's possible that the severe supply chain challenges increased the importance of this factor, and as availability improves other factors may drive the selection of supplier.

As supply chains stabilise and availability improves, it is likely that other factors – such as price, quality, and service offerings – will regain prominence in influencing distributor selection.

PRICE IS THE SECONDARY PRIORITY

The second most important factor in choosing a distributor was price. Nine out of ten respondents (91%) cited price as a key factor in their decision, with even more (96%) high-volume purchasers paying attention to it. This underscores the financial pressures faced by businesses, particularly in high-volume purchasing scenarios where cost control is critical.

There was little difference in the factors that drove the selection of a distributor between the groups who primarily purchased for R&D, production, and maintenance. They all shared similar concerns about price, indicating its universal importance across different purchase purposes.

CONVENIENCE-DRIVEN FACTORS

Ease of ordering. coupled with convenience, were the third and fourth most important factors. Convenience-oriented factors, such as a broad product range, flexible payment options, and seamless ordering processes, ranked highly across respondent groups.

The preference for a "one-stop-shop" reflects buyers' desire to minimise administrative overhead and streamline procurement.

For high-frequency purchasers, financial convenience was more important. Payment options/terms being the fourth most important factor, and own brands offering better value for money the fourth and fifth most important factors for these purchasers.

APPROVED SUPPLIER LISTS FOR PRODUCTION PURCHASERS

While approved distributor status was less influential for most respondents, it ranked higher among production purchasers. This aligns with the stricter compliance and quality assurance requirements typical of production environments, where consistency and reliability are essential.

LIMITED INFLUENCE OF VALUE-ADDED SERVICES

Although some of the most important factors were related to convenience, many supplementary offerings from suppliers were given a low priority. Services such as quoting systems, value-added services, and a choice of delivery options were ranked much lower, with fewer than half of the respondents considering them important. This indicates that while such features may enhance the buying experience, they are secondary to core factors like availability and price.

APPROVED SUPPLIER LISTS FOR PRODUCTION PURCHASERS

While approved distributor status was less influential for most respondents, it ranked higher among production purchasers. This aligns with the stricter compliance and quality assurance requirements typical of production environments, where consistency and reliability are essential.

Top Six Factors Determining Choice of Distributor

BUYERS' BIGGEST HURDLES: AVAILABILITY, PRICE, AND BEYOND

The survey was run from May to July 2024, a time when electronic component availability was limited, and many products were either very hard to source or on allocation. It highlights the significant hurdles buyers encountered during a period of severe supply chain disruption, shedding light on both immediate and systemic challenges in the procurement of electronic components.

PRODUCT AVAILABILITY: THE BIGGEST CHALLENGE

It's not surprising that the primary challenge identified by buyers was product availability. In fact, availability was cited as the biggest issue by over half the respondents.

This was a direct result of the global shortage of electronic components during the survey period (May–July 2024). Allocation constraints and limited stock likely exacerbated delays and created difficulties in meeting production, R&D, and maintenance timelines. The supply chain challenges enabled suppliers with stock to command higher prices, compounding buyers' struggles.

As supply chains stabilise, availability may become less of a concern, allowing other challenges, such as cost and efficiency, to rise in prominence.

PRICING PRESSURES

Price was the second biggest challenge, and ranked the top concern for a fifth (21%) of the respondents. This reflects the financial strain buyers faced due to inflated costs during a period of high demand and low supply. It's likely that suppliers leveraging scarce inventory may have increased prices, putting pressure on tighter budgets.

While availability may ease over time, price challenges could persist, particularly if suppliers maintain elevated pricing levels or if inflationary pressures remain.

OTHER CHALLENGES FACED BY BUYERS

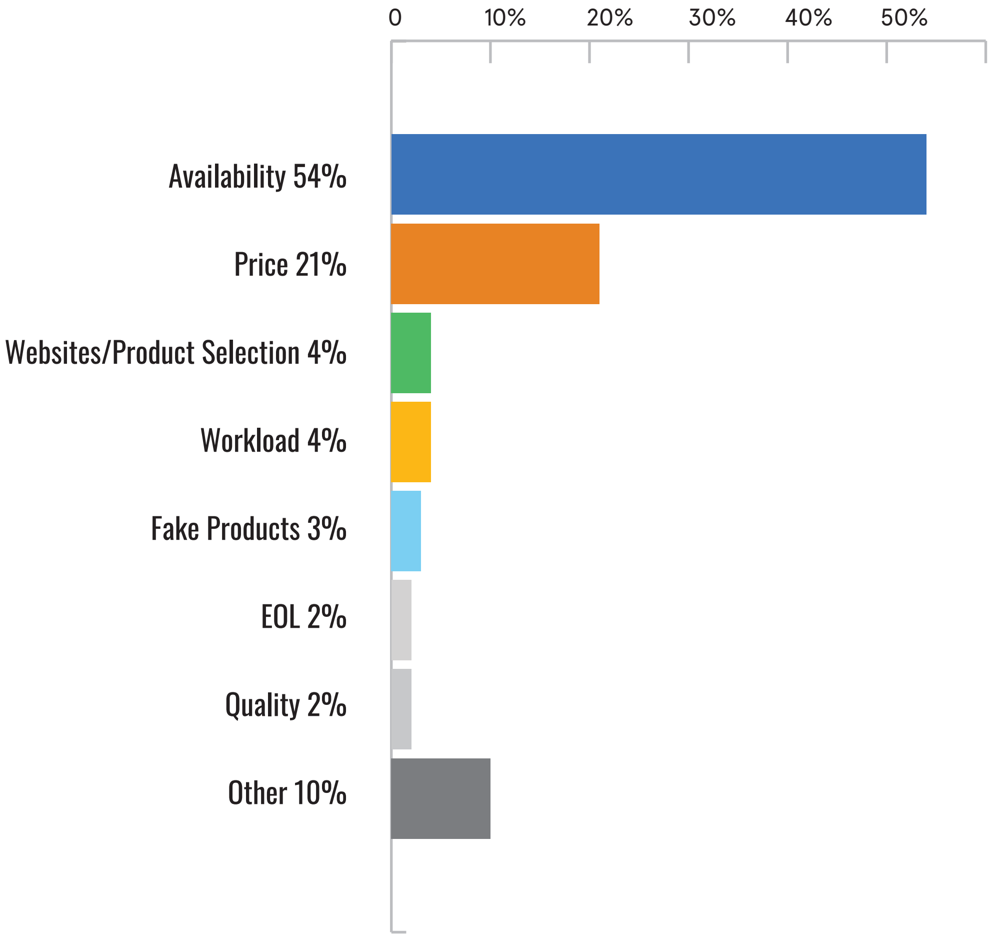
The other challenges faced by buyers covered a wide range of issues.

Navigating distributor websites:
4% of respondents identified difficulty finding products on distributor websites as their biggest challenge, indicating potential gaps in user experience or search functionality.

Workload concerns:
Another 4% cited workload as their primary challenge, suggesting that manual processes and administrative burdens in procurement are key pain points for some buyers.

Counterfeit and end-of-life products:
Fake products (3%) and product end-of-life issues (2%) were noted as niche but critical challenges, particularly for buyers in industries where quality and reliability are non-negotiable. These concerns underscore the importance of sourcing from trusted distributors with robust quality assurance mechanisms.

Quality issues:
Quality concerns (2%) were less commonly reported but remain vital, especially in applications where component failure could have significant consequences.



Biggest Challenges Faced by Buyers

IMPLICATIONS FOR BUYERS

While availability and price were the dominant challenges during this period of constrained supply chains, the survey identified other persistent issues, such as lack of technology adoption by buyers, workload for purchasers, distributor website navigation and quality concerns. As market conditions evolve, addressing these challenges will require a collaborative approach between buyers and distributors, emphasising efficiency, transparency, and trust.

We can make the following strategic recommendations based on the results of the research:

1. **Enhance Procurement Planning:**
   - Proactive inventory management and long-term supplier partnerships can help mitigate availability challenges.
   - Implementing tools like eProcurement systems can streamline sourcing and reduce workload.
2. **Prioritise Reliable Suppliers:**
   - Focusing on distributors with strong track records for quality and reliability can minimise risks associated with counterfeit and end-of-life products.

CONCLUSION

This research provides constructive insights into the purchasing behaviours, challenges, and preferences of electronic component buyers during a period of significant supply chain disruption. Key findings include:

Availability as a Top Priority:
Buyers overwhelmingly emphasised product availability as the most critical factor when selecting distributors. This reflects the impact of ongoing global supply chain challenges during the survey period. However, even when supply chain challenges ease, it is important to note that the short lead time requirements of purchasers mean that ensuring good product stock and availability is critical to the success of distributors.

Price Sensitivity and Convenience:
While availability was the primary driver of decision-making, price and ease of ordering were also key priorities, highlighting the importance of cost-efficiency and seamless procurement processes.

Low Uptake of Automation Tools:
Despite the potential to streamline processes, adoption of eProcurement systems and BOM upload tools remains low, especially among smaller companies. This presents a significant opportunity for innovation and adoption in the sector, as well as offering the potential of significant efficiency improvements to companies that adopt the technology.

Diverse Decision-Making Processes:
Distributor selection is buyer-driven, with minimal reliance on approved supplier lists in most companies. However, decision-making processes and approval workflows vary widely based on company size and purchasing frequency. The report makes several recommendations that identify how a more structured approach to procurement could significantly enhance the process for many companies.

Challenges Beyond Supply Chain Issues:
Buyers cited additional hurdles, including workload, counterfeit products, and quality concerns. These challenges emphasise the need for trusted partnerships, robust quality assurance, and operational efficiency.

As supply chains stabilise, the focus may shift toward long-term improvements in pricing strategies, technology adoption, and enhanced convenience. Distributors and suppliers that address these evolving priorities by offering reliable availability, competitive pricing, and innovative solutions will be well-positioned to capture market share in a competitive landscape.

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Pang, A, Markovski, M and Ristik, M;. (10th June 2024). Top 10 Procurement Software Vendors, Market Size and Market Forecast 2023-2028. Apps Run The World.

METHODOLOGY

RESPONDENT DEMOGRAPHICS

Key demographic and professional details included:

- **Geographic Reach:** All respondents were based in Europe, covering a wide range of industries and regions.
- **Roles and Responsibilities:** Participants included purchasing managers, engineers, and procurement specialists involved in sourcing electronic components for work.
- **Company Sizes:** The respondents represented companies of various sizes, ranging from fewer than 50 to more than 500 employees.

SURVEY DESIGN AND QUESTIONS

The survey was structured to gather qualitative and quantitative insights about purchasing behaviours, challenges, and preferences.

- **Core Focus Areas:**
  - Purchasing Drivers
  - Challenges
  - Technology Adoption
  - Decision-Making Authority
- **Respond Format:**
  - **Closed-ended:** Questions with multiple-choice and Likert scale for statistical analysis.
  - **Open-ended:** Questions to capture qualitative feedback and innovative suggestions.
- **Anonymity:** Participants were clearly informed about anonymity and could choose to remain anonymous or not.