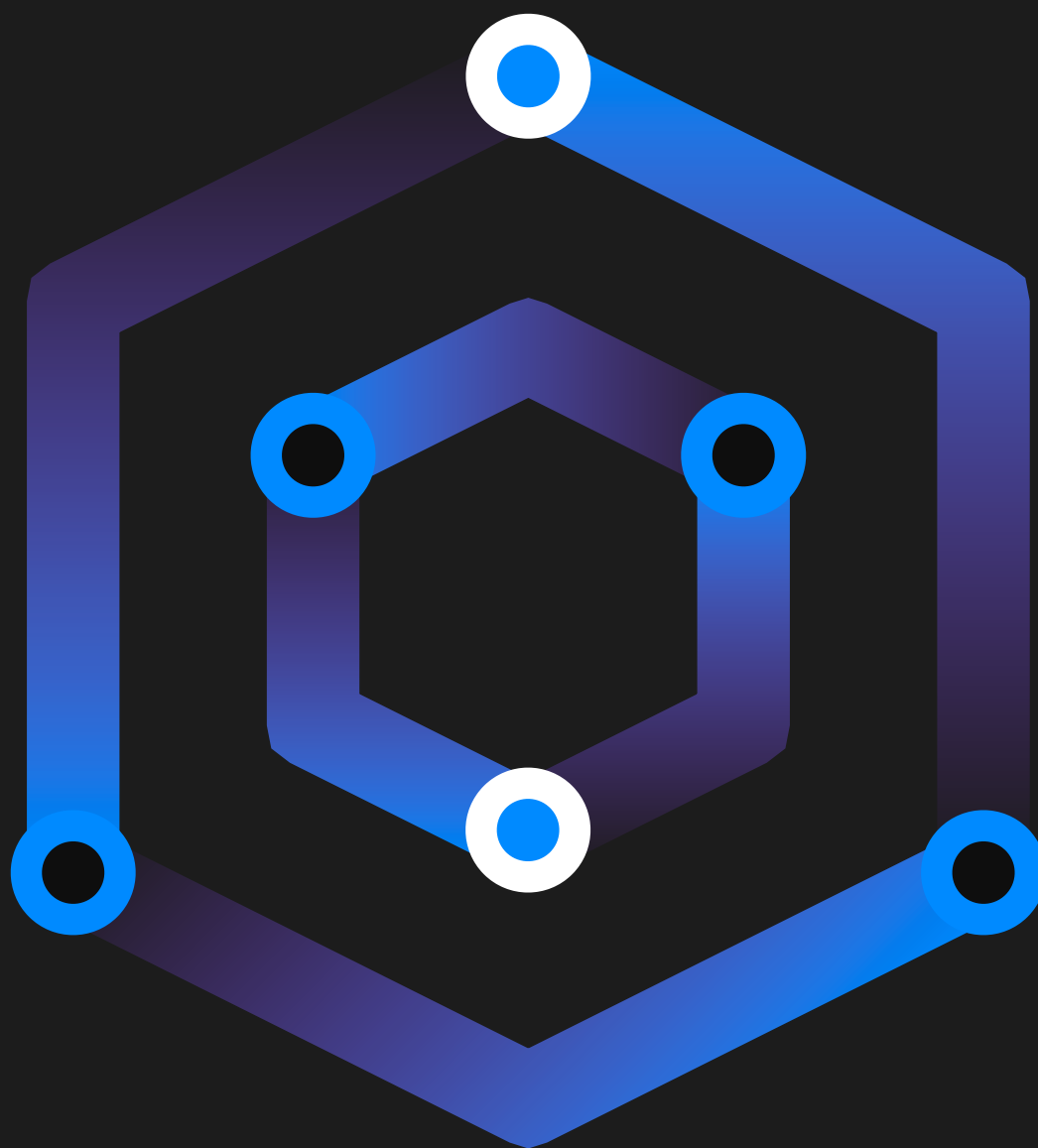


# Automation and RPA in the enterprise

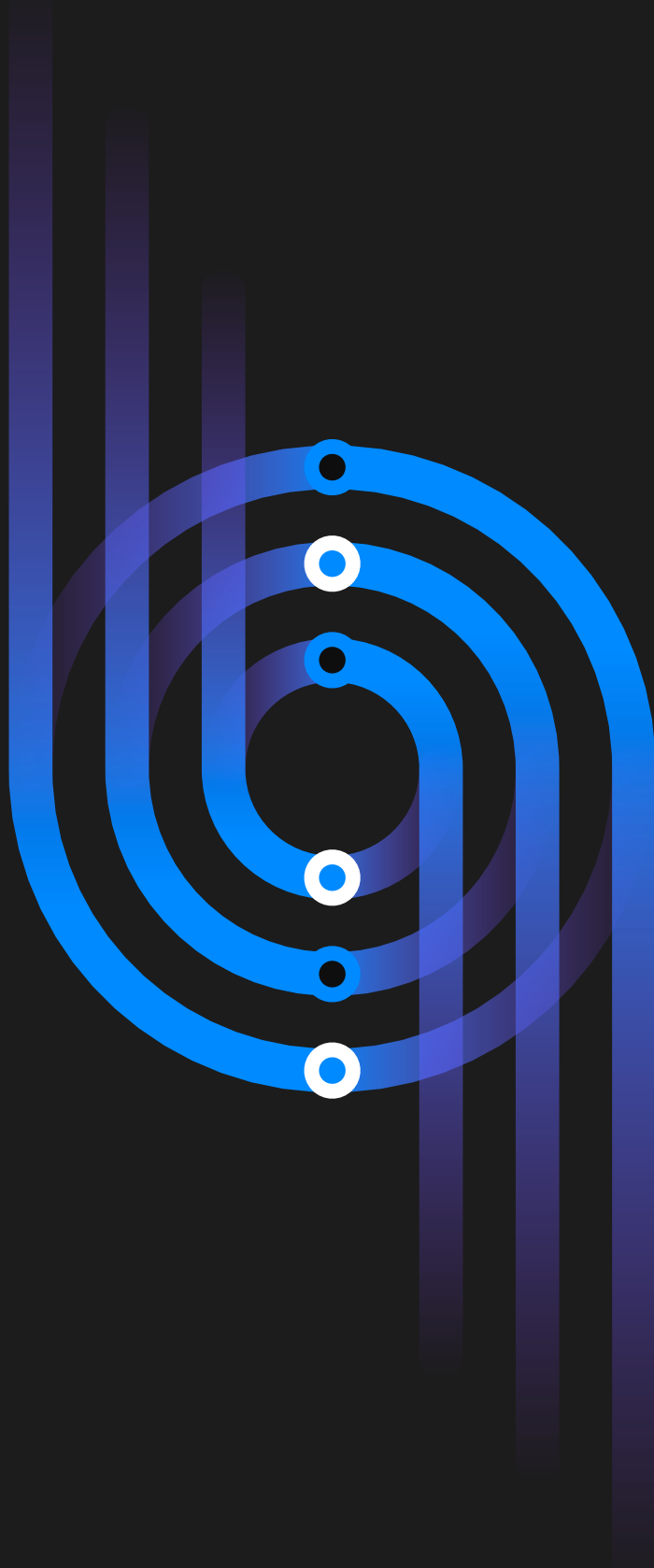
How organizations are improving  
productivity and accelerating value

*Results from research conducted in 2021  
by IBM Market Development & Insights*



## **About the research**

The IBM Market Development & Insights team conducted a series of surveys on the experiences of companies that have deployed or are considering deploying automation technologies, including robotic process automation (RPA) solutions. The surveys capture the perceptions, expectations and real-world experiences of more than 600 decision makers in large enterprises and midsize businesses across the United States, Canada, the United Kingdom, Australia and India. Respondent roles span IT and line of business (LOB), and their answers provide intriguing insight into the experiences and challenges of effectively implementing automation capabilities across the organization.



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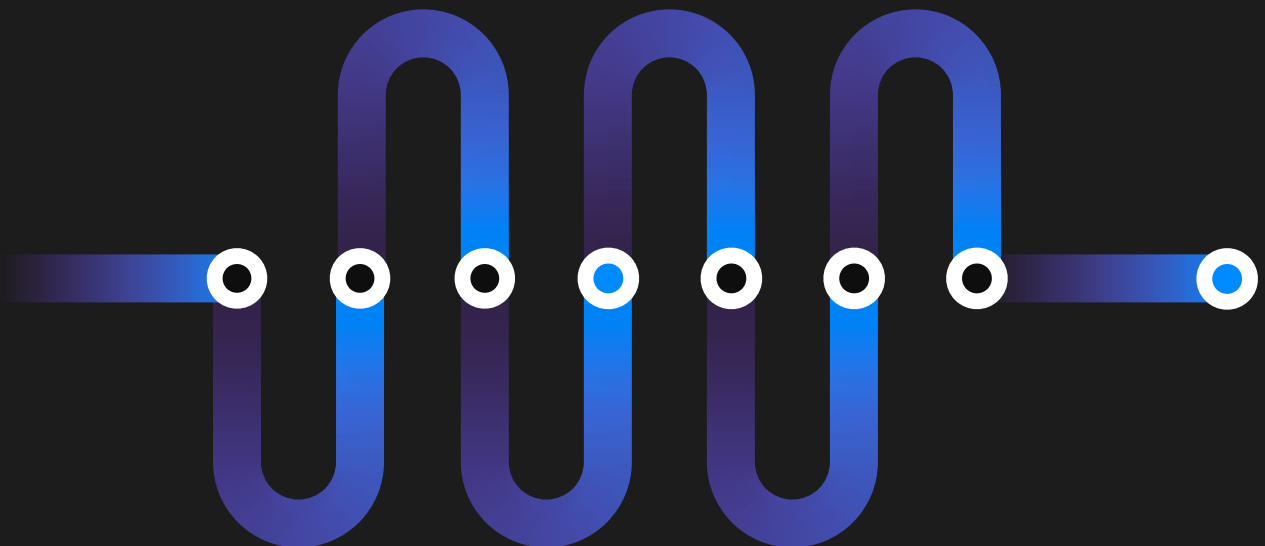
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# Automation for a world of business challenges

Automating business processes isn't a new concept; what is new are the many ways that innovative automation technologies are being used and the kinds of real-world benefits being achieved by organizations worldwide.

Applying automation to simplify routine or mundane tasks frees up a workforce to do more strategic, higher value work, such as bringing new products to the marketplace. It's also enhancing the customer experience by improving response time and accuracy. Businesses are realizing the benefits of automation through reduced inefficiencies and human errors, which are lowering business costs and improving data quality.

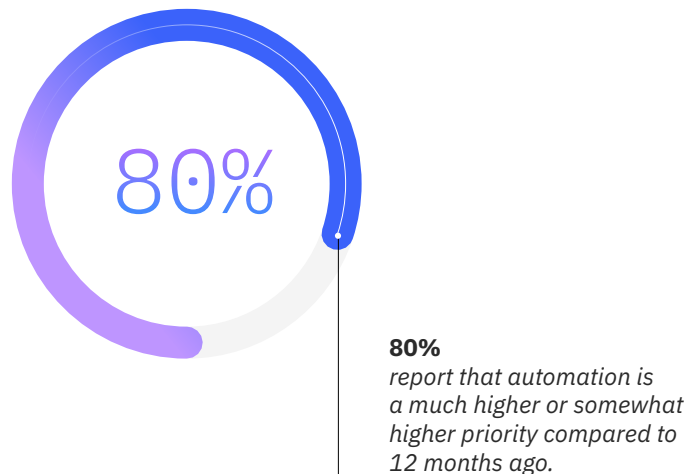
Through robotic process automation, organizations are capitalizing on artificial intelligence (AI) insights to streamline many repetitive, formerly manual back-office tasks. Through RPA solutions, including those offering low-code or no-code authoring tools, line-of-business users are solving emerging business challenges in real time. Although both general automation and RPA solutions are delivering quantifiable business benefits, RPA adopters say they're getting even greater value from their solutions.



# Embracing automation

## Survey results overview

Respondents say their organizations have made automation an increasing priority in recent years. This trend experienced even greater urgency during 2020, with a heightened focus on maximizing efficiency and large segments of the workforce shifting to working from home because of the pandemic.



*See Figure 1 for complete data.*

---

**RPA user, IT, US, large enterprise**

*“Our company was already progressively moving toward automating everything, and COVID forced us to speed up that process.”*

**Non-RPA user, LOB, US, midsize business**

*“It’s a different work environment post-COVID, and efficient use of resources has been made a higher priority.”*

### **Respondents revealed where automation is being deployed most and the challenges they've faced**

Most common functions where automation or RPA solutions are deployed:

- IT
- Customer service and support
- E-commerce
- Supply chain management
- Marketing

Key prioritization areas:

- IT operations
- Digital and data security
- Workforce utilization and optimization
- Network optimization
- Customer experience optimization

Challenges in adopting or expanding the use of automation and RPA solutions:

- Talent with automation expertise can be expensive and hard to find.
- Ease of implementation is a concern.
- Learning automation technologies can be complex.

Survey respondents reported that despite these challenges, deploying automation and RPA capabilities has been worth the effort and that their organizations plan to ramp up their use of automation solutions.

# Automation and robotic process automation

At their most basic level, automation solutions digitize and streamline routine work. Business process management was an early example of automation. While RPA and artificial intelligence share some characteristics, AI is data-driven, finding patterns in data that enable process improvement. To achieve this, AI brings together capabilities such as intelligent automation, machine learning (ML), natural language processing (NLP), reasoning, hypothesis generation and analysis. RPA, on the other hand, is process-driven, using bots that can only follow processes that are defined for it by a user.

Robotic process automation uses rules-based software to perform many back-office tasks at extremely high speed and high volume. Time-consuming actions, such as filling in forms and moving files, are being automated, freeing expensive human resources for more strategic or complex activities. In addition to significant cost savings and higher employee morale, RPA improves business agility to drive higher customer satisfaction and helps reduce errors to support compliance efforts. Furthermore, RPA solutions can require less coding and won't disrupt existing infrastructure and systems because software bots work at applications' presentation layer.

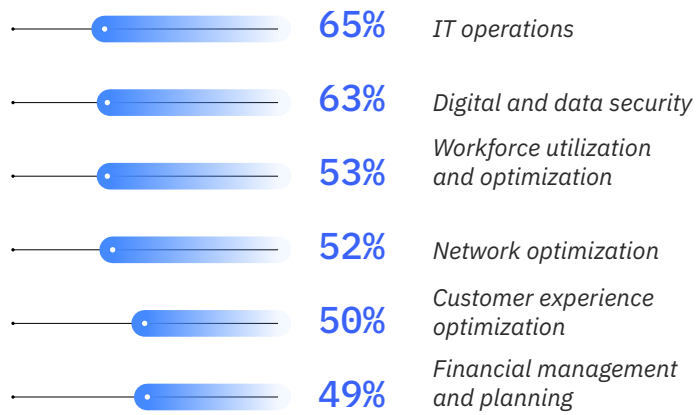
[www.ibm.com/cloud/learn/rpa](https://www.ibm.com/cloud/learn/rpa)

# Automation in action

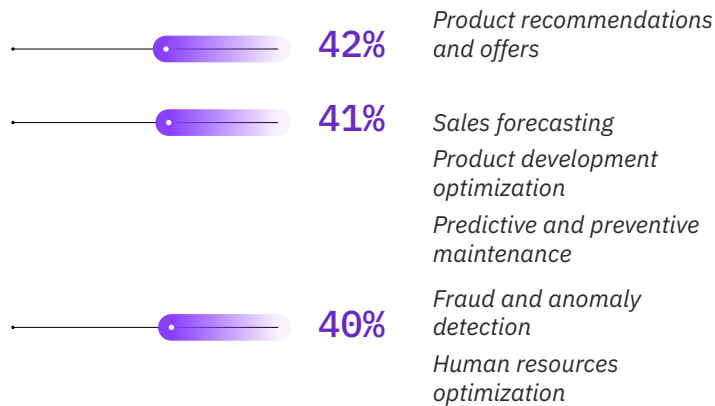
## Primary use cases today and what organizations are planning for the next 12 months

Respondents were asked how their organization is using automation and RPA solutions currently and what additional use cases they have planned for automation over the next year.

### Today



### Next 12 months



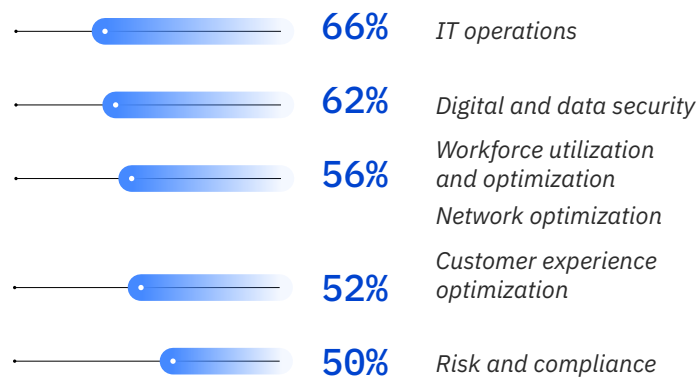
See Figure 2 for complete data.



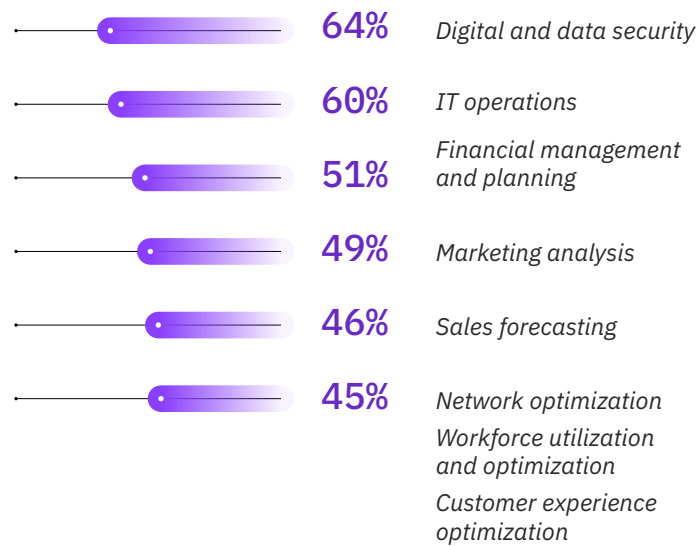
### Use cases by organization size

Breaking these answers down by company size, some differences emerge in how automation is being used today:

#### Large enterprises



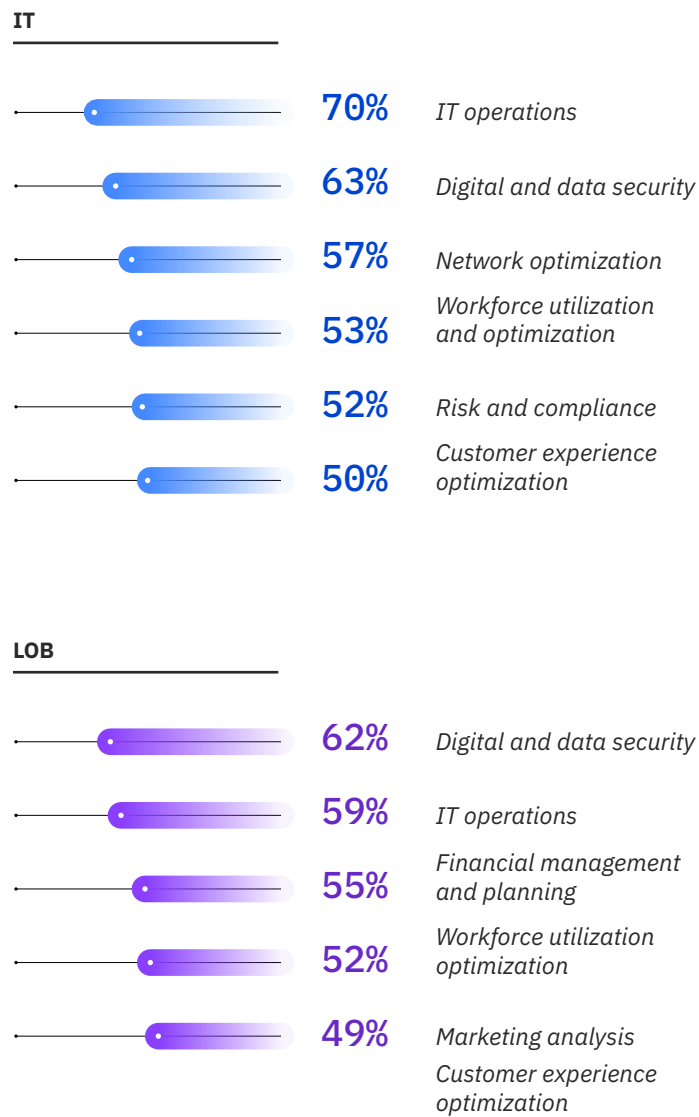
#### Midsized businesses



See Figure 3 for complete data.

### Use cases by role

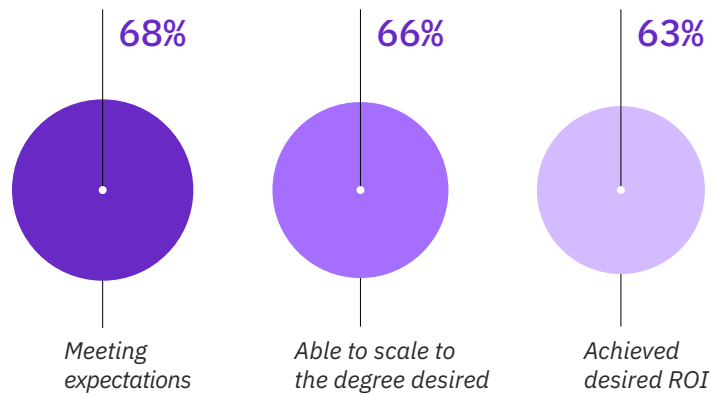
With a few exceptions, respondents in both IT and LOB roles reported similar rates of adoption for their current use cases. Some differences seen were expected, such as more IT roles reporting automation being used in their organization for IT operations and network optimization, while LOB roles had greater adoption of automation for financial management and planning as well as for sales forecasting:



See Figure 3 for complete data.

### Satisfaction with current automation products

Respondents were also asked about their satisfaction with the automation and RPA products their organization currently uses, their ability to effectively scale automation projects and the return on investment (ROI) they've experienced.

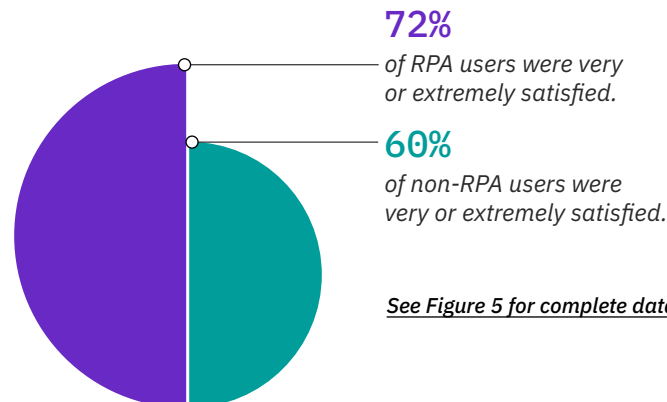


...

Percentage of respondents answering either 4 or 5 on a scale of 1–5, with 1 being not at all satisfied and 5 being completely satisfied

See Figure 4 for complete data.

Decision makers were asked about their satisfaction with the types of automation solutions their company is using.



See Figure 5 for complete data.

### What people said:

RPA and automation technologies received enthusiastic praise from respondents. Here's a sampling of what they said:

**RPA user, LOB, US, midsize business**

*“The company’s goals have been achieved thanks to this.”*

**RPA user, IT, US, midsize business**

*“Made operations more efficient and more profitable.”*

**Non-RPA User, IT, Australia, large enterprise**

*“Cleaner data, access to identical data sets that are up to date which makes decision making and customer service easier.”*

### Key takeaways

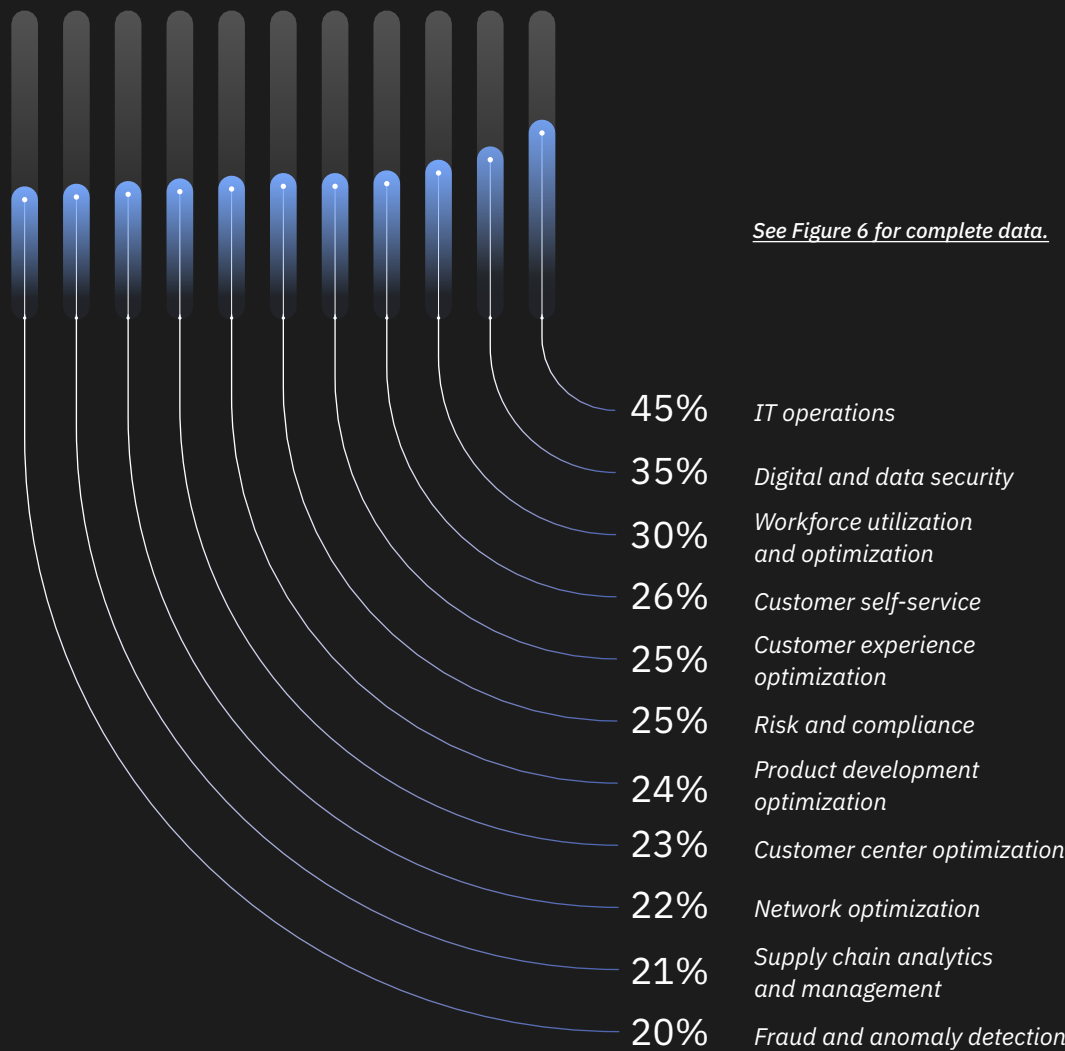
- Expanding existing automation capabilities is increasingly seen as a business imperative—one becoming more vital by the day.
- Most respondents said that their organizations have deployed automation capabilities for common tasks in areas that include IT operations, security, network and workforce optimization, and customer experience. Over the next 12 months, they plan to extend automation and RPA capabilities for product recommendations, predictive and preventive maintenance, product development, and fraud detection.
- While a large majority of respondents believe that the automation and RPA solutions deliver their expected value, there is room for improvement in their ability to scale and realize even stronger ROI.

***Automation is delivering quantifiable business benefits across a wide range of functions and processes.***

# Where the bots are

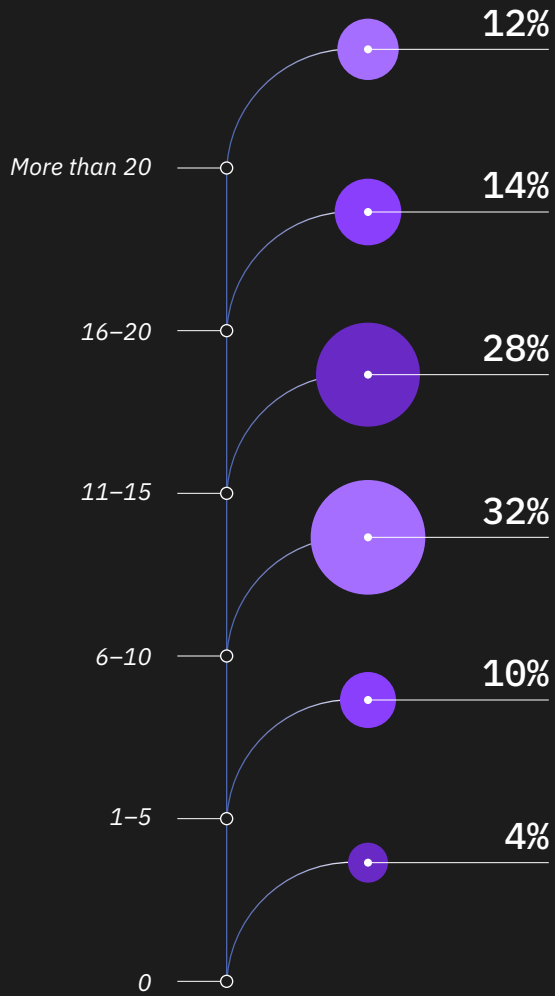
Robotic process automation software bots are increasingly being deployed to perform many repetitive, mundane tasks that busy workers don't have the time—or desire—to do. Today, bots are orchestrating workflows, capturing data and managing content. They're becoming integrated with business rules and decisions, shortening development cycles, and reducing the traditional reliance on IT to quickly stand up new capabilities.

Survey respondents indicated that their organizations are using bots across multiple areas of the business.



See Figure 6 for complete data.

Asked how many bots their company currently had in  
production, survey respondents said:

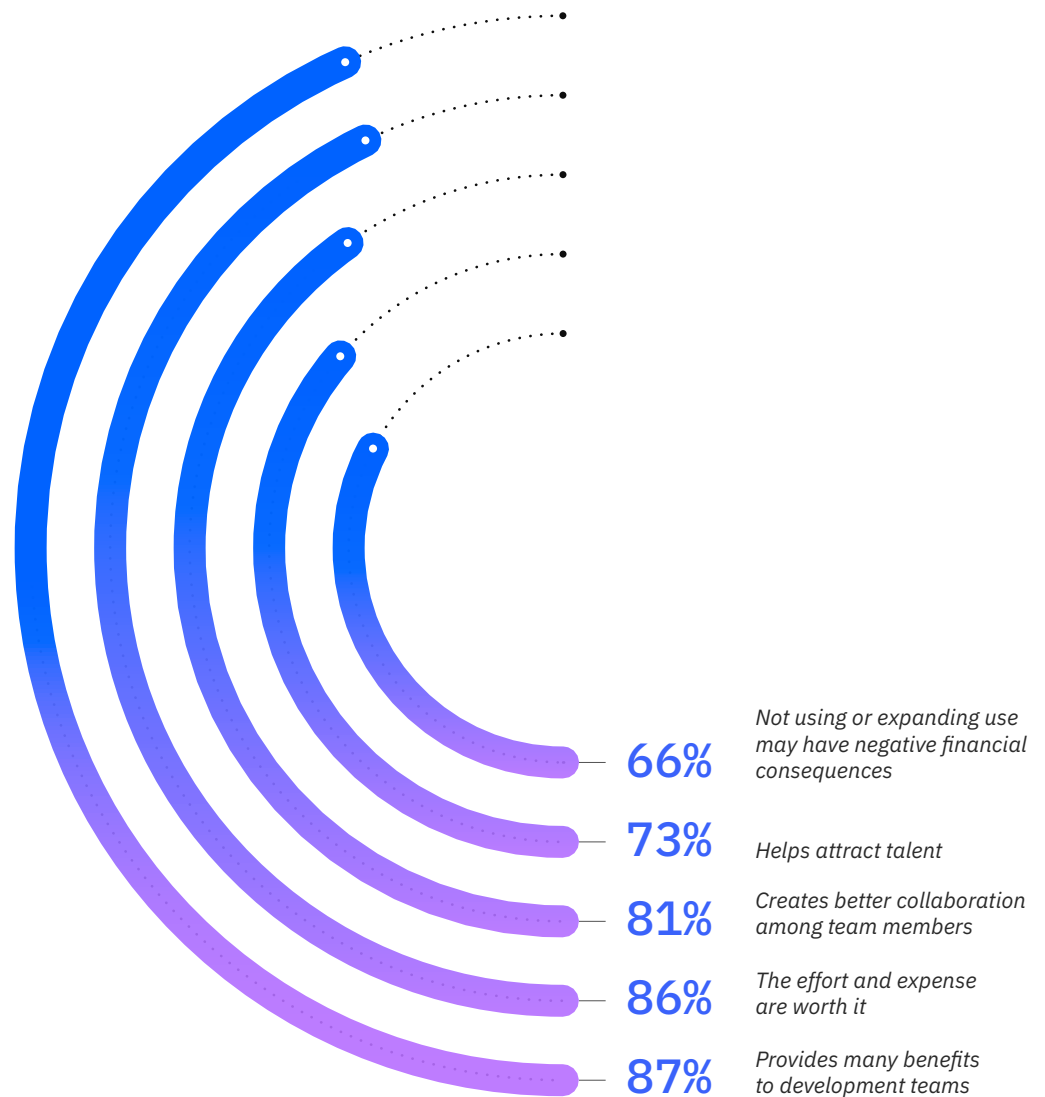


[See Figure 6 for complete data.](#)

# Perceptions, benefits and challenges

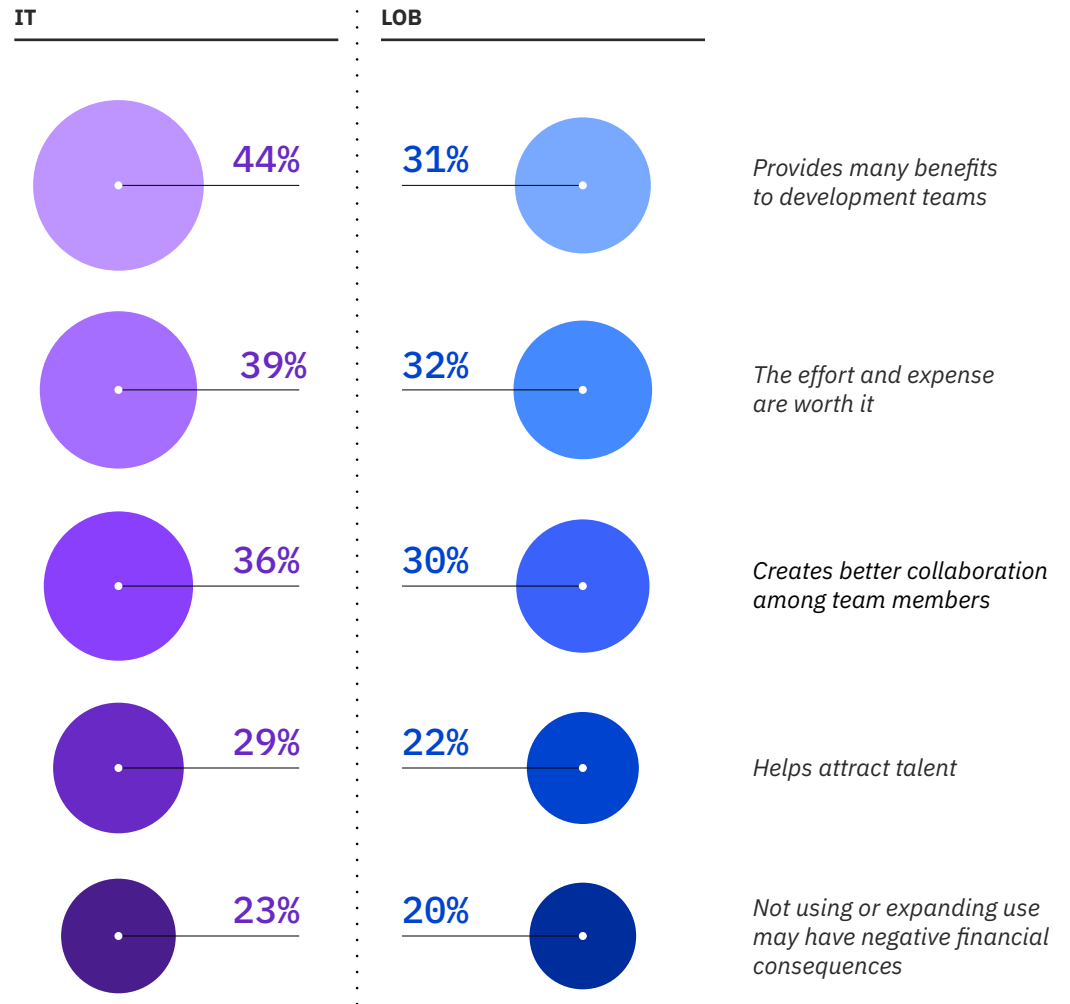
## Perceptions

Numerous benefits for automation and RPA solutions were identified by participants who agree or agree completely with the following statements:



See Figure 7 for complete data.

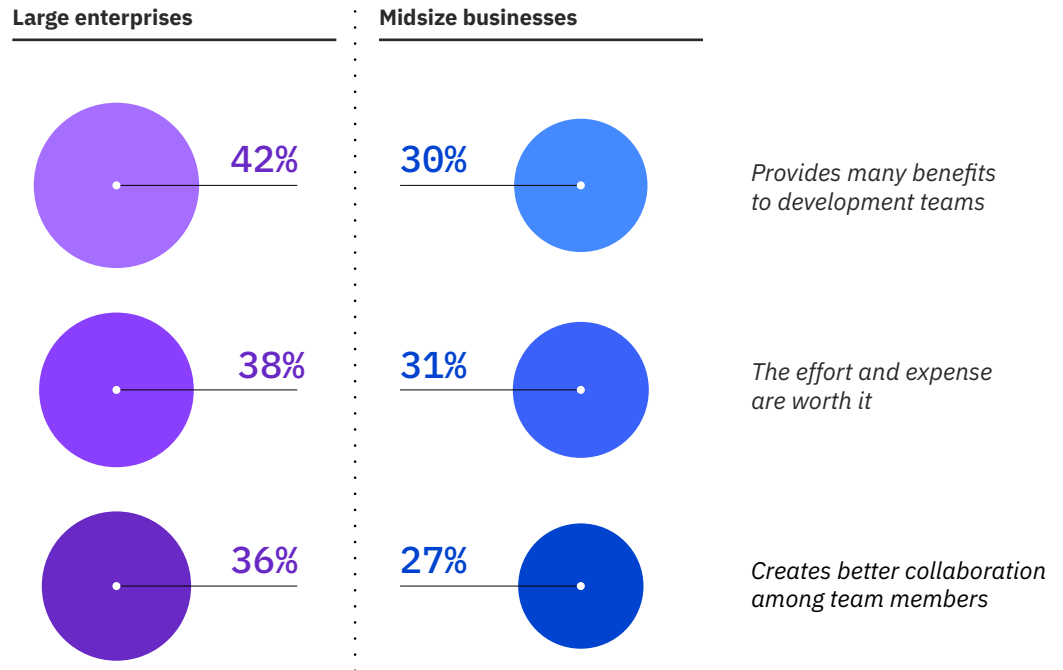
Breaking down these responses by role, some differences come to light between IT and LOB respondents, as noted by those who agree completely with the following statements:



See Figure 8 for complete data.



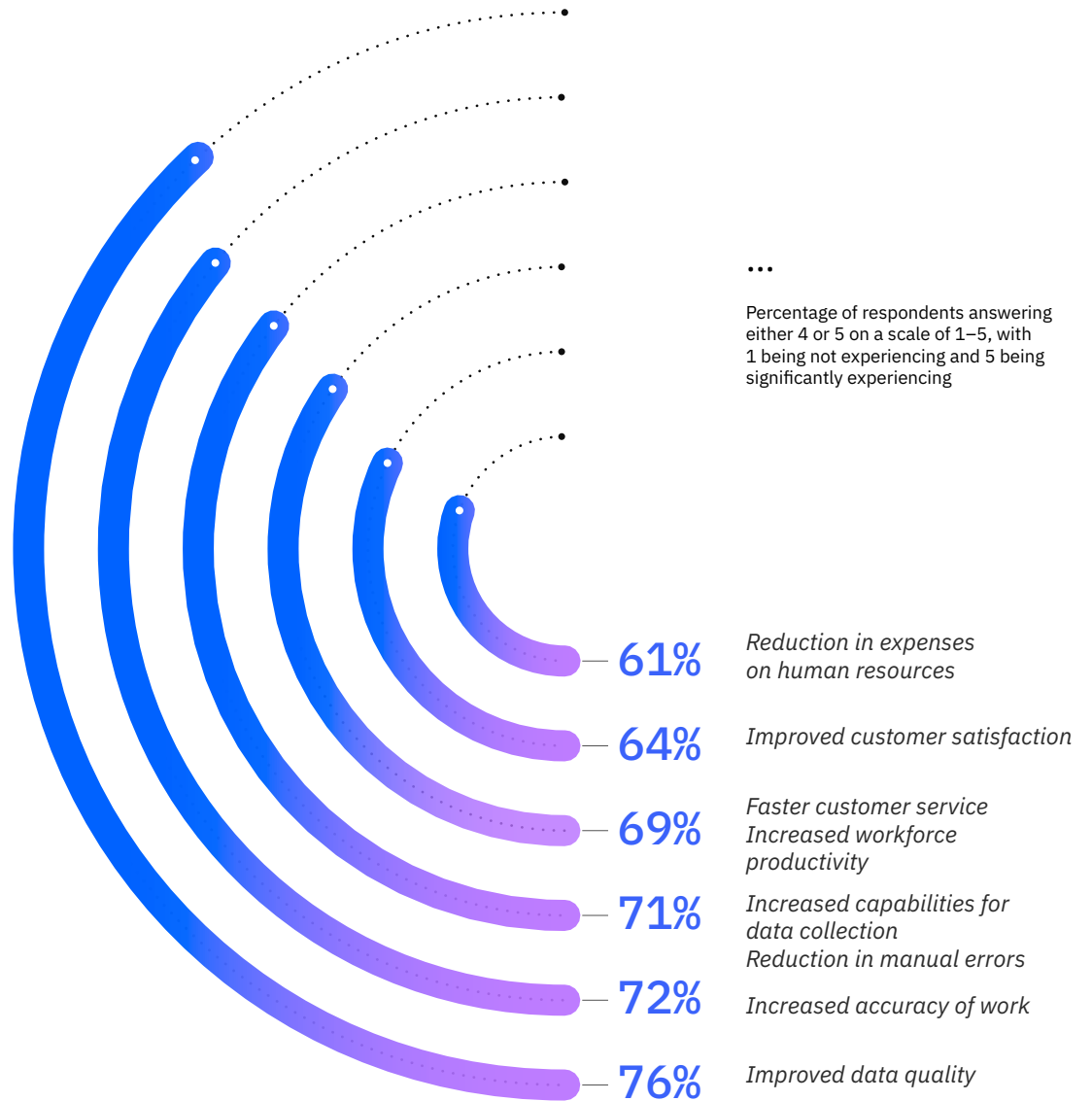
Respondents from large enterprises felt even more strongly about some of these statements than did those from midsize businesses, as noted by those who agree completely with the following statements:



See Figure 8 for complete data.

### Key benefits

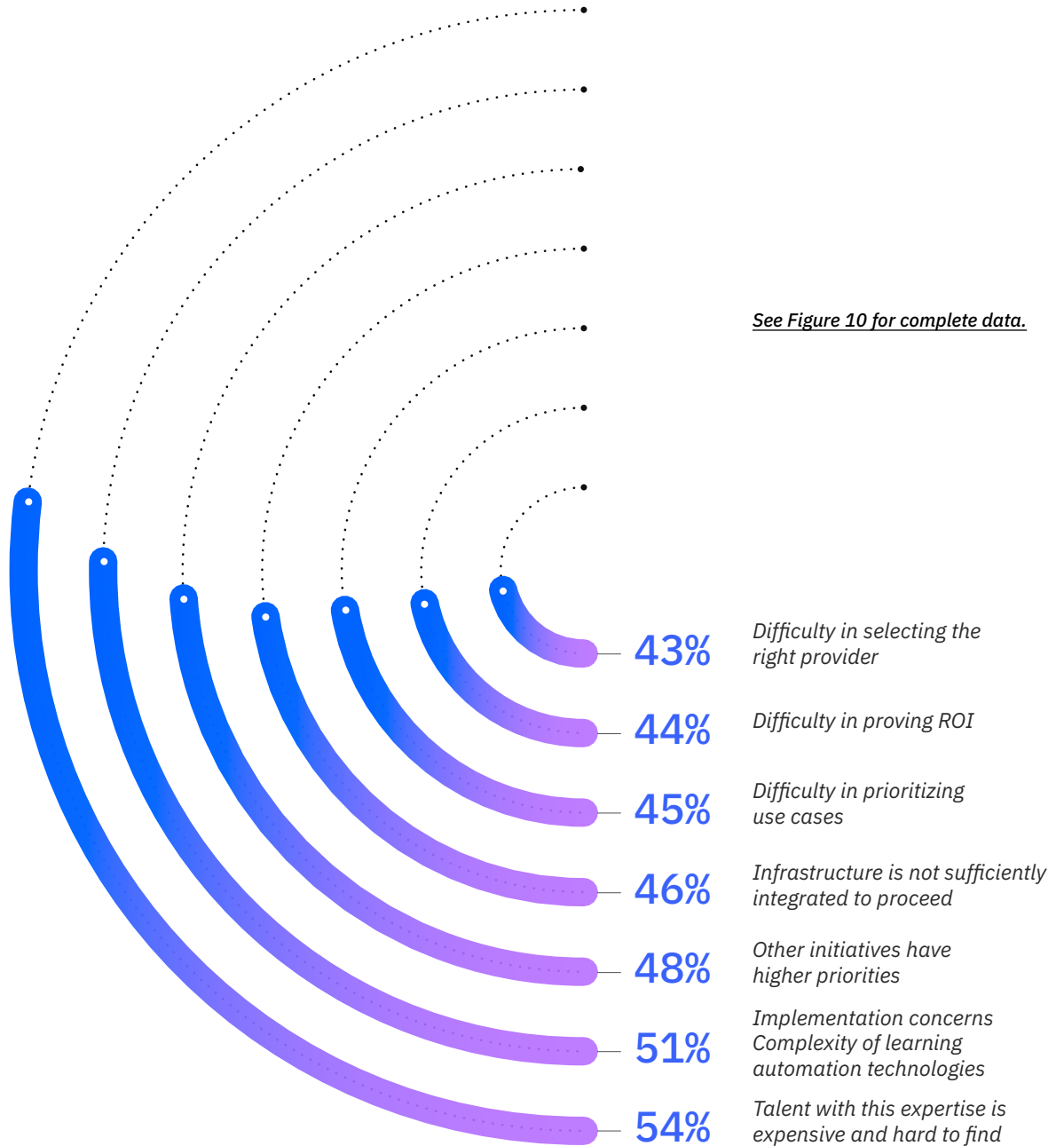
Asked about the specific benefits their organization has experienced, better data quality and greater accuracy led the list.



See Figure 9 for complete data.

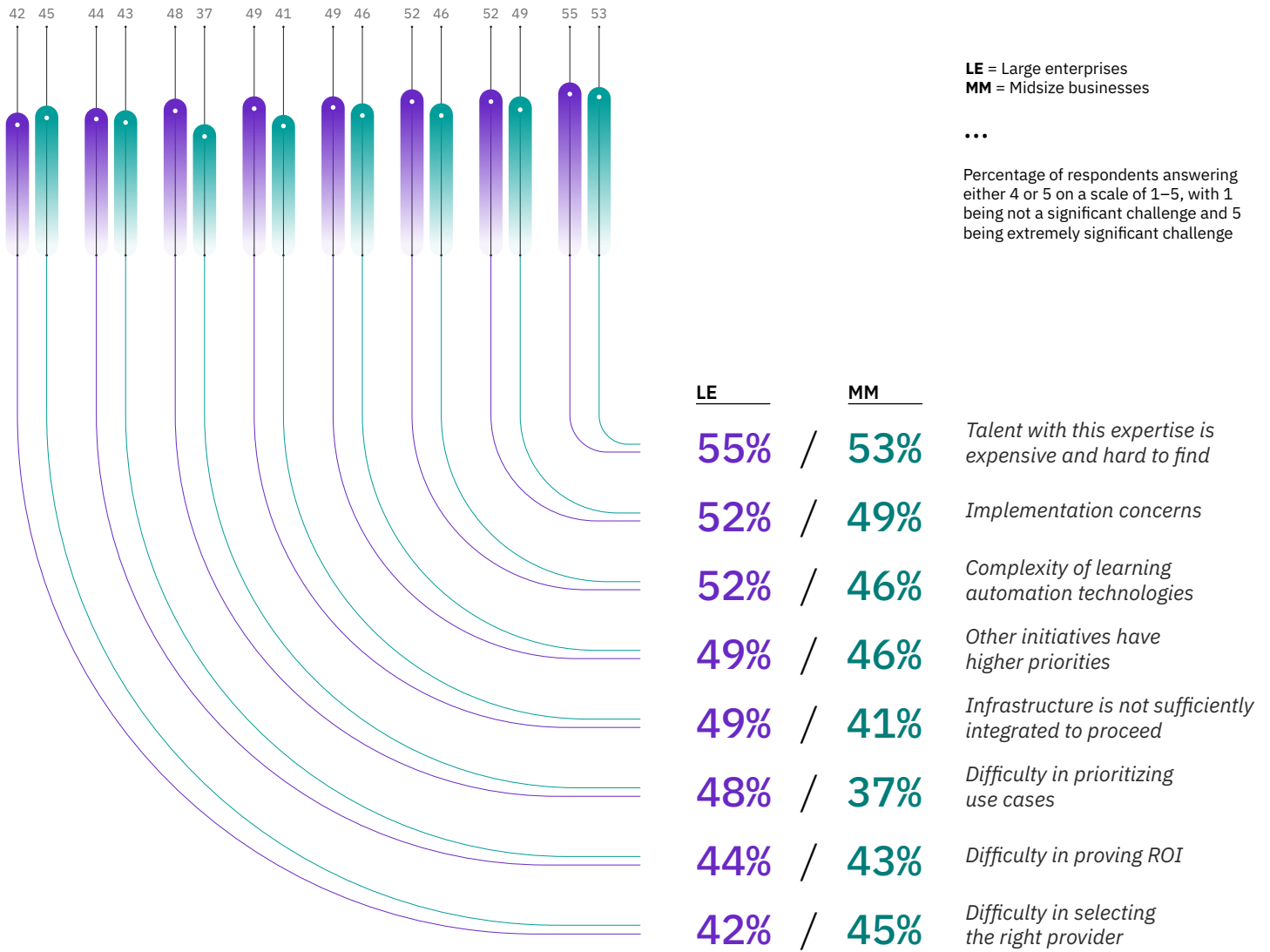
### Top challenges

Several challenges for deploying or expanding use of automation and RPA solutions were named by respondents, which included:



See Figure 10 for complete data.

Once again, respondents from large enterprises agreed more strongly with most of the following statements than did those from midsize businesses:



See Figure 10 for complete data.

### **Key takeaways**

- Even with the challenges, respondents say the effort required to implement both automation and RPA is worth it.
- The benefits to development teams, improved collaboration and the ability to attract skilled talent were noted by an overwhelming majority.
- Primary challenges centered on integration with current systems and processes; lack of internal talent; and the need for support in prioritizing use cases, proving ROI and vendor selection.

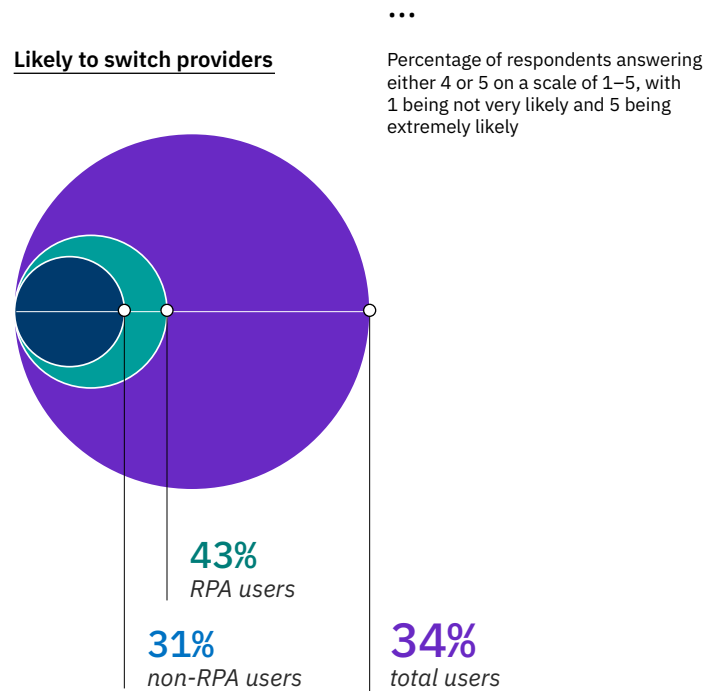
***Ultimately, most respondents believe that not implementing automation and RPA into the organization will be a costly mistake.***

# What businesses want

## Support, price, and the ability to integrate and scale head the list

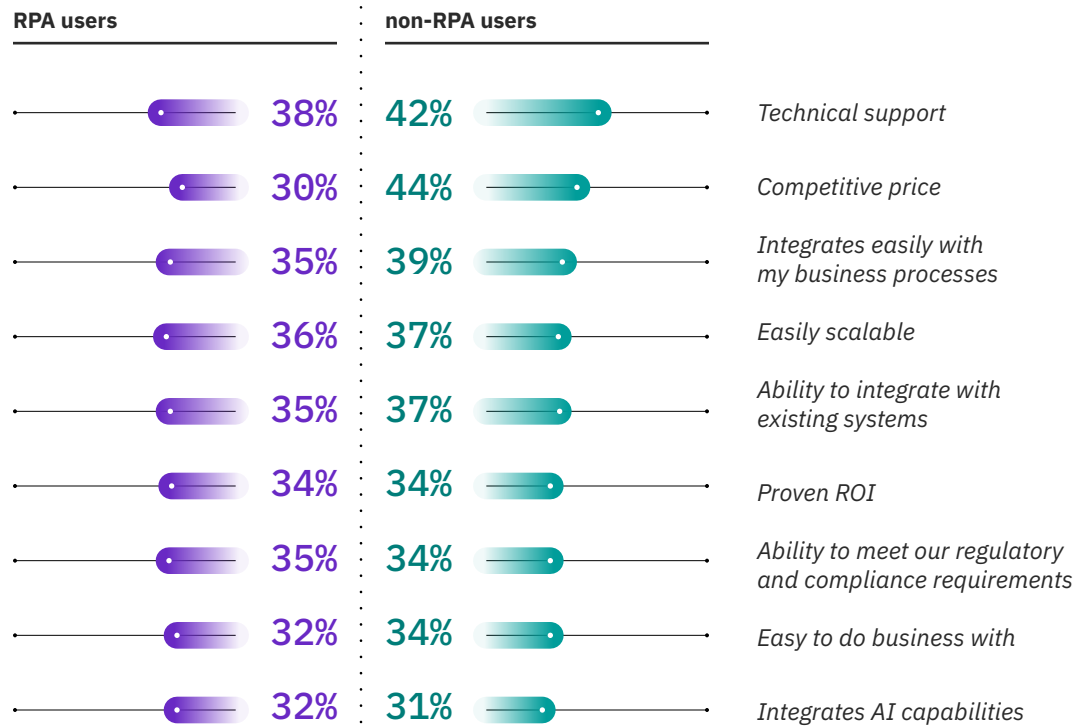
While most automation and RPA users report being satisfied by their current automation products and solutions, many are looking to new vendors for additional capabilities, lower prices, and more effective help in integrating and supporting their automation solution.

A full one-third of respondents said they are likely to switch providers in the next 12 months, with a significantly higher percentage of RPA users saying they're even more likely to seek new vendors:



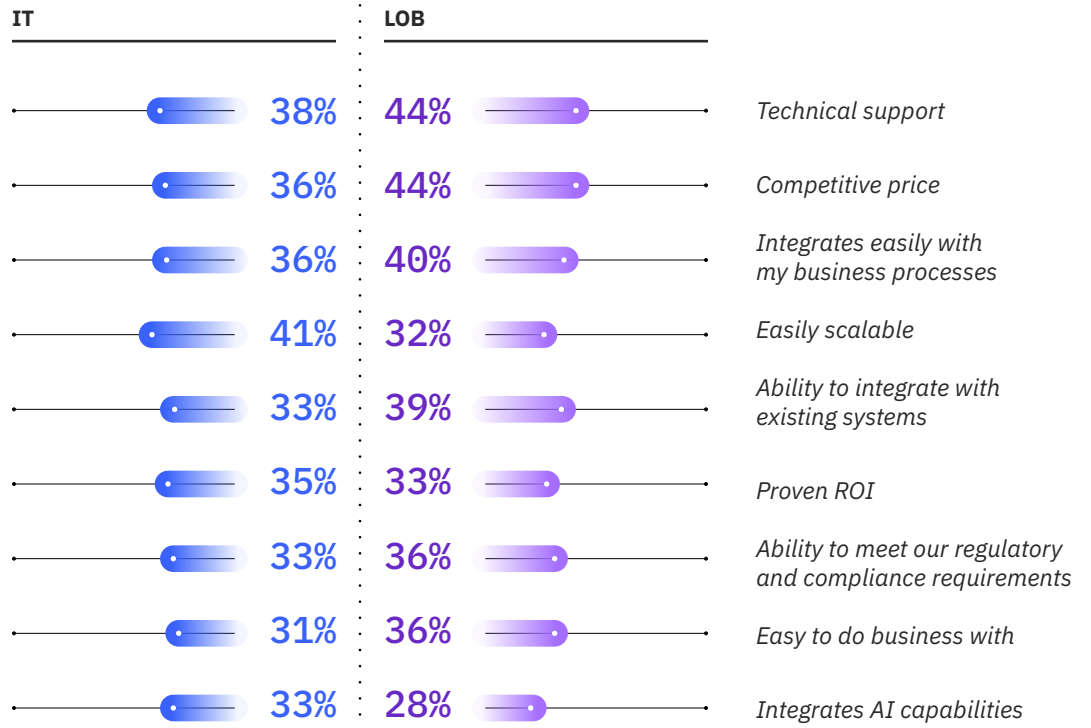
See Figure 11 for complete data.

Asked to rank the top five things from a lengthy list of vendor attributes that were most important to them, respondents most commonly selected:



See Figure 12 for complete data.

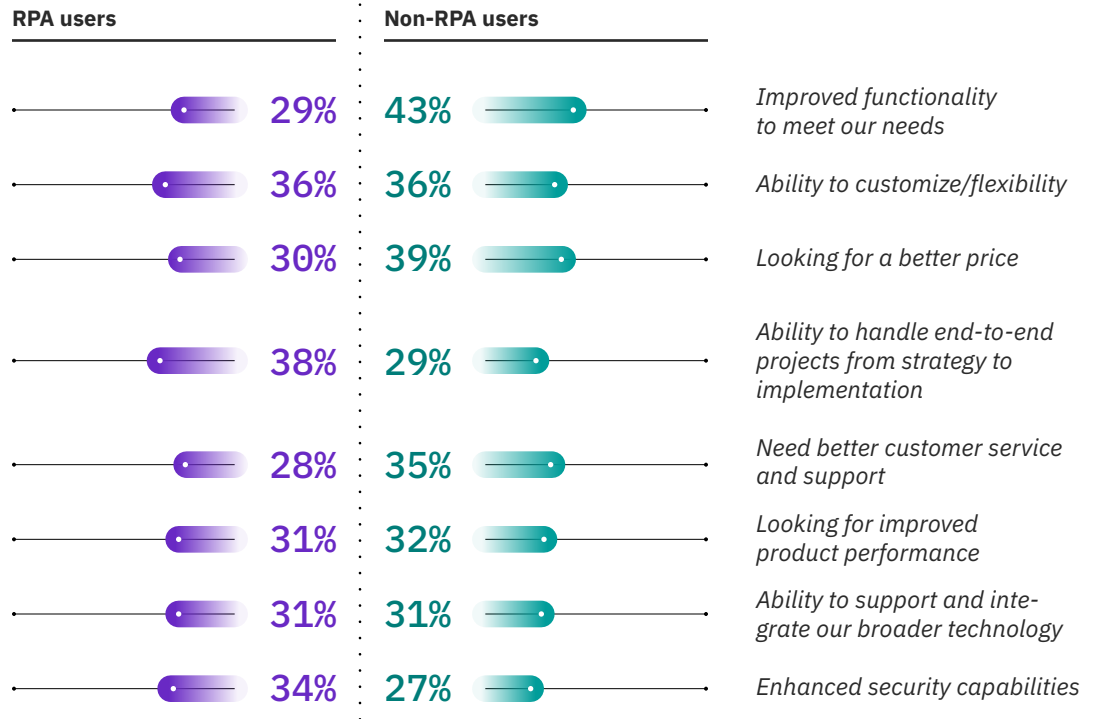
Breaking these responses down by role, differences emerge in what IT and LOB responders are looking for in a vendor:



See Figure 13 for complete data.



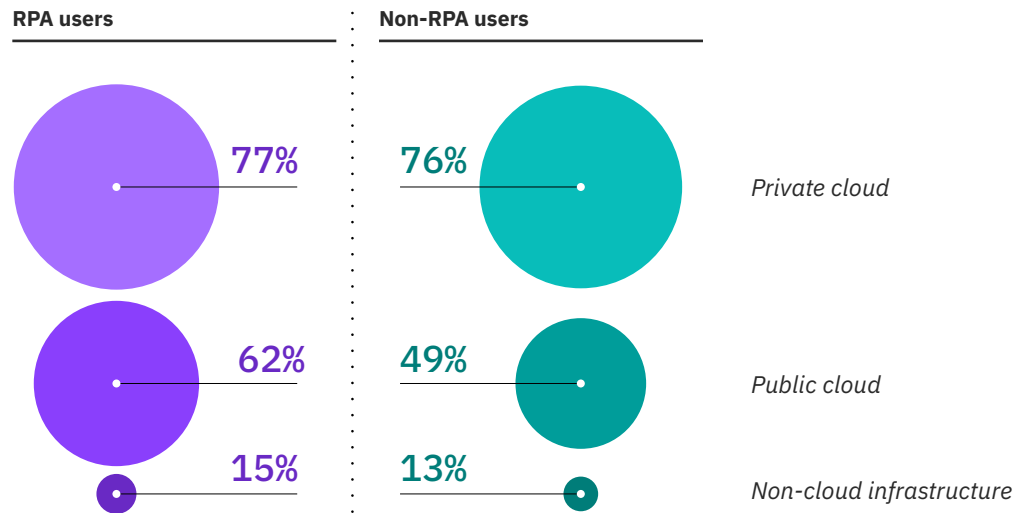
Asked about the primary factors driving them to consider switching automation providers, RPA and non-RPA users called out functionality, customizability and price, as well as the provider’s ability to handle projects from end to end, among their most common answers:



*See Figure 14 for complete data.*

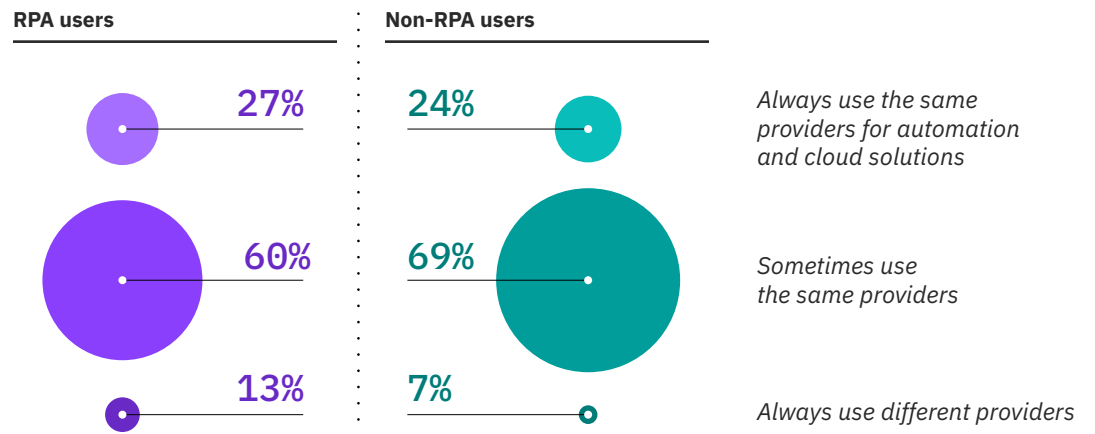
An interesting note is that 33 percent of RPA users say they’re likely to switch vendors as a result of moving to a new cloud platform or cloud services provider, while only 16 percent of non-RPA users say the same.

Asked about the type of cloud or other infrastructure used for their automation and RPA solutions, respondents indicated a mix of technologies.



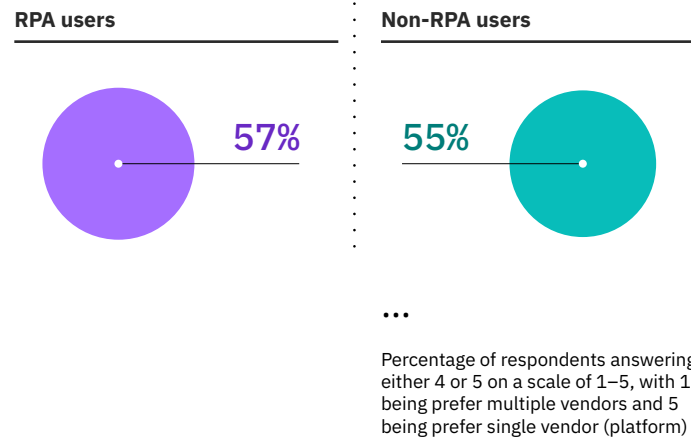
*See Figure 15 for complete data.*

Users were also asked if they use the same or different vendors for their automation and their cloud solutions.



*See Figure 16 for complete data.*

Participants were then asked about their preference for buying automation and RPA solutions from a single vendor or on a single platform versus buying products or solution components from multiple vendors or platforms. Both roles slightly preferred a single vendor or platform:



See Figure 17 for complete data.

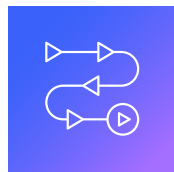
### Key takeaways

- Vendor flexibility and the ability to design, deploy and customize solutions from end to end were valued by respondents.
- Most reported using a mix of private and public cloud, and using a single vendor for their automation solutions was the preferred approach.

***While automation solutions are seen to be delivering real value for organizations, users want even more features and flexibility, lower costs, and more help with implementation and integration—and they’re willing to look at new vendors to achieve their aims.***

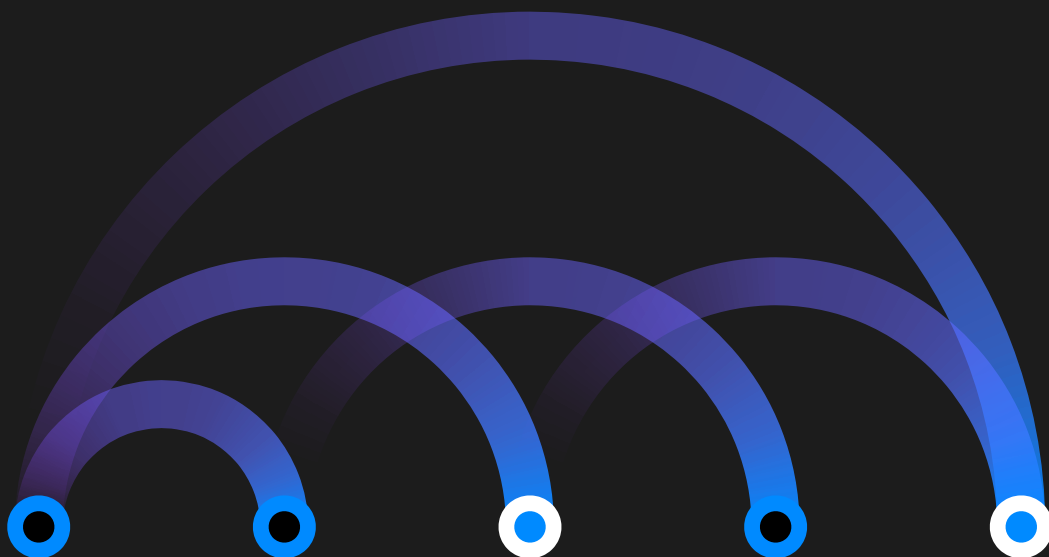
## Take the next step

Automation and robotic process automation technologies are helping organizations across a range of industries speed development, reduce costs, improve business agility and enhance the customer experience. Respondents are convinced that automation will continue to play a major role in the future of their organizations.



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Find out how far your automation journey can take you.





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# Appendix

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### Automation priority level compared to 12 months ago

Total n=604, RPA users n=189, non-RPA users n=415

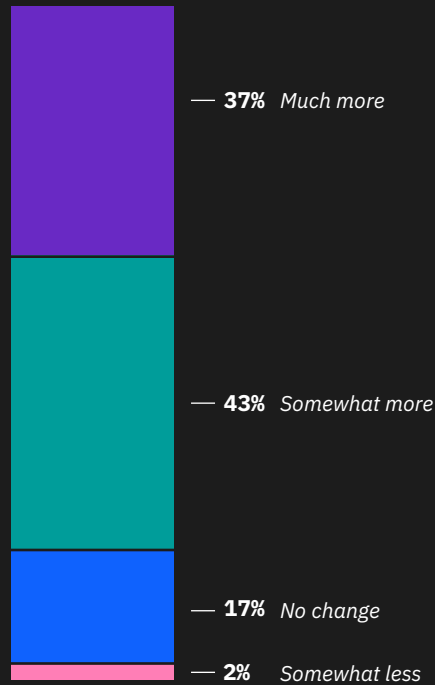


Figure 1

Q1. Compared to 12 months ago would you say that automation is?

Q1a. Why is automation less of a priority than 12 months ago?

Q1b. Why has your focus on automation stayed the same in comparison to 12 months ago?

Q1c. Why is automation more of a priority now than 12 months ago?

**Top automation/RPA SW use cases**

Total n=604, RPA users n=189, non-RPA users n=415

	Not using, not likely to implement	Likely to implement in next 12 months	Currently use
IT operations	8%	37%	65%
Digital/data security	7%	38%	63%
Workforce utilization and optimization	11%	28%	53%
Network optimization	11%	33%	52%
Customer experience optimization	13%	34%	50%
Financial management and planning	14%	39%	49%
Marketing analysis	16%	37%	48%
Risk and compliance	15%	36%	48%
Logistics analysis and optimization	16%	34%	47%
Customer self-service	15%	27%	46%
Supply chain analytics and management	16%	32%	46%
Fraud/anomaly detection	15%	30%	45%
Sales forecasting	16%	31%	43%
Production and inventory forecasting	19%	34%	43%
Contact center optimization	21%	34%	41%
Product development optimization	18%	30%	41%
Human resources optimization	19%	35%	41%
Physical security	29%	34%	37%
Predicting mechanical failures/preventive maintenance	22%	31%	37%
Product recommendations or offers	24%	32%	34%

Figure 2

Q7. For what use cases is your organization applying [INSERT “RPA” IF RPA USER] automation software today, and in what areas are you most likely to apply new automation tools in the next 12 months?



Top automation/RPA SW use cases (% currently using)

**A/B** Significant difference at the 95% level

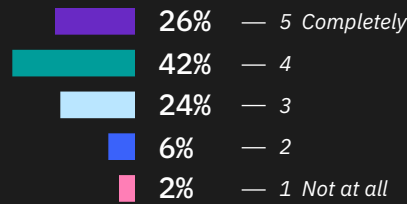
	TOTAL	Role		Size	
		IT (A)	LOB (B)	LE (A)	MM (B)
IT operations	65%	70%	59%	66%	60%
Digital/data security	63%	63%	62%	62%	64%
Workforce utilization and optimization	53%	53%	52%	56% B	45%
Network optimization	52%	57% B	47%	56% B	45%
Customer experience optimization	50%	50%	49%	52%	45%
Financial management and planning	49%	43%	55% A	47%	51%
Marketing analysis	48%	47%	49%	48%	49%
Risk and compliance	48%	52% B	43%	50% B	41%
Logistics analysis and optimization	47%	48%	46%	49%	41%
Customer self-service	46%	47%	44%	47%	42%
Supply chain analytics and management	46%	46%	45%	48% B	39%
Fraud/anomaly detection	45%	47%	42%	48% B	38%
Sales forecasting	43%	39%	48% A	42%	46%
Production and inventory forecasting	43%	43%	43%	46%	37%
Contact center optimization	41%	43%	38%	42%	37%
Product development optimization	41%	41%	40%	43%	35%
Human resources optimization	41%	41%	41%	41%	40%
Physical security	37%	37%	37%	40% B	31%
Predicting mechanical failures/preventive maintenance	37%	36%	38%	40% B	30%
Product recommendations or offers	34%	33%	35%	35%	31%

Figure 3

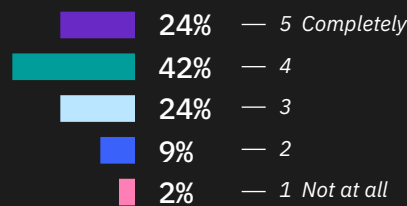
Q7. For what use cases is your organization applying [INSERT “RPA” IF RPA USER] automation software today, and in what areas are you most likely to apply new automation tools in the next 12 months?

### Extent automation has met expectations

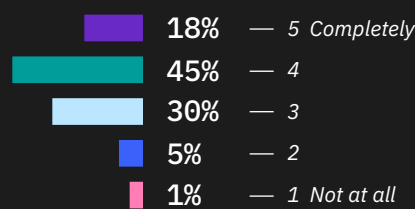
Total n=604, RPA users n=189, non-RPA users n=415



Been able to meet expectations with your current automation products?



Been able to scale your automation projects to the degree you'd like?



Achieved your desired ROI from automation projects?

Figure 4

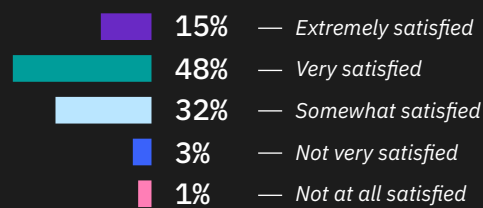
Q3. To what extent has your organization ...

### Satisfaction with automation/RPA solutions currently using

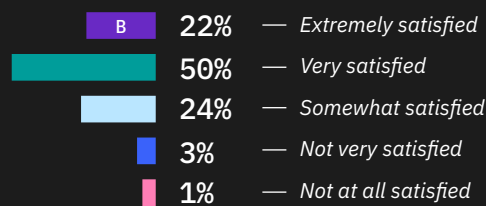
Total n=604, RPA users n=189, non-RPA users n=415

**A/B** Significant difference at the 95% level

#### Total



#### RPA users (A)



#### Non-RPA users (B)

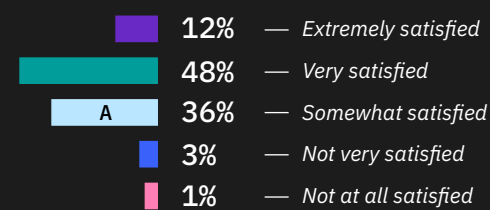


Figure 5

Q13. How satisfied would you say you are with the [INSERT “RPA” IF RPA USER] automation solutions your organization currently uses?

Q14. What is driving your satisfaction with your current [INSERT “RPA” IF RPA USER] automation solutions?

[IF Q13 = 1–3] What could be improved?

[IF Q13 = 4–5] What is going well?

*Purpose of bots (among those using RPA with a bot in production)*



Figure 6

Q8. You mentioned that you currently are using RPA in your organization. Approximately how many bots do you have in production? (n=189)

Q9. What is the purpose of the bots you currently have in production? (n=181)

Q10. [Ask of those who indicated they use RPA in S4] What proportion of your RPA bots are being used for back-office processes vs. front office processes? (n=168)

**Agreement level on automation statements**

Total n=604, RPA users n=189, non-RPA users n=415

	Do not agree at all	Disagree	Neither	Agree	Agree completely
Provide many benefits to development teams	0%	2%	11%	49%	38%
The effort and expense of adoption is worth it	1%	2%	12%	50%	36%
Creates better collaboration among team members	1%	3%	16%	48%	33%
Helps attract talent	1%	5%	22%	47%	26%
Keeping up with the pace of innovation is challenging	1%	7%	21%	47%	23%
Not using/expanding use may have negative financial consequences	3%	8%	23%	44%	22%
Decisions often derailed by executive disagreement or inaction	5%	19%	27%	32%	16%
Are overkill for most of our needs	14%	31%	20%	22%	15%
Implementation of is overwhelming	6%	21%	23%	35%	14%

Figure 7

Q6. How much do you agree or disagree with the following statements related to automation?

Agreement level on automation statements (% agree completely)

**A/B** Significant difference at the 95% level

	TOTAL	Role		Size	
		IT (A)	LOB (B)	LE (A)	MM (B)
Provide many benefits to development teams	38%	44% B	31%	42% B	30%
The effort and expense of adoption is worth it	36%	39%	32%	38%	31%
Creates better collaboration among team members	33%	36%	30%	36% B	27%
Helps attract talent	26%	29% B	22%	25%	26%
Keeping up with the pace of innovation is challenging	23%	26%	20%	22%	27%
Not using/expanding use may have negative financial consequences	22%	23%	20%	24%	18%
Decisions often derailed by executive disagreement or inaction	16%	18%	13%	16%	16%
Are overkill for most of our needs	15%	17% B	11%	14%	15%
Implementation of is overwhelming	14%	17% B	11%	15%	12%

Figure 8

Q6. How much do you agree or disagree with the following statements related to automation?

### Degree to which benefits of automation/RPA are experienced

Total n=604, RPA users n=189, non-RPA users n=415

**A/B** Significant difference at the 95% level

	Don't know/ too early to tell	1 Not experiencing	2	3	4	5 Significantly experiencing
Improved data quality	3%	1%	3%	17%	38%	38%
Reduction in manual errors	4%	1%	5%	18%	37%	34%
Increased accuracy of work	4%	1%	4%	20%	40%	32%
Faster customer service	4%	2%	3%	22%	37%	32%
Increased capabilities for data collection	4%	2%	4%	19%	41%	30%
Increased workforce productivity	4%	1%	6%	20%	39%	30%
Improved customer experience	5%	2%	5%	24%	36%	29%
Improved customer satisfaction	7%	1%	5%	23%	37%	27%
Reduction in expenses on human resources	5%	3%	8%	22%	34%	27%
Enhanced DM support to ID best actions to resolve issues quickly	6%	1%	7%	24%	36%	25%
Ability to scale to add or reduce quickly as needs fluctuate	5%	2%	8%	23%	40%	23%
Ensure policy compliance	7%	2%	6%	25%	37%	23%
Shortened development cycles	6%	2%	8%	25%	35%	23%
Reduced reliance on IT by enabling business users	5%	3%	9%	27%	35%	22%

Figure 9

Q11. To what degree is your organization experiencing the following benefits of [INSERT "RPA" IF RPA USER] automation software?

**Degree of challenges to adoption/expansion of automation/RPA software**

Total n=604, RPA users n=189, non-RPA users n=415

**A/B** Significant difference at the 95% level

	1 Not significant challenge	2	3	4	5 Extremely significant challenge	LE (A)	MM (B)
Talent with this expertise is expensive/difficult to find	6%	12%	28%	35%	19%	55%	53%
Concerns with implementation	7%	15%	28%	36%	15%	52%	49%
Complexity of learning automation technologies	6%	11%	32%	34%	17%	52%	46%
Other initiatives are higher priorities	7%	14%	31%	30%	18%	49%	46%
Infrastructure is not sufficiently integrated to proceed	9%	14%	30%	32%	14%	49%	41%
Difficulty prioritizing which use cases to apply automation software to	8%	15%	33%	31%	14%	48% B	37%
Difficulty proving ROI	7%	18%	31%	29%	15%	44%	43%
Difficulty selecting the right provider	10%	16%	31%	26%	17%	42%	45%
Lack of core KPIs assigned to define success	9%	16%	32%	29%	13%	42%	44%
Not enough advocates in our org./skepticism among sr. execs	9%	20%	30%	27%	13%	39%	43%
Lack of industry standards	12%	20%	30%	25%	14%	39%	37%
Fear of vendor lock-in	13%	19%	31%	26%	11%	38%	36%

Figure 10

Q12. Please rate the degree to which each of the following has been a significant challenge in successfully adopting or expanding the use of [INSERT "RPA" IF RPA USER] automation software within your organization.

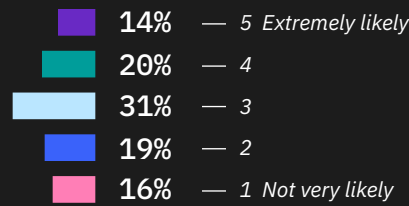


### Likelihood to switch automation/RPA providers in next year

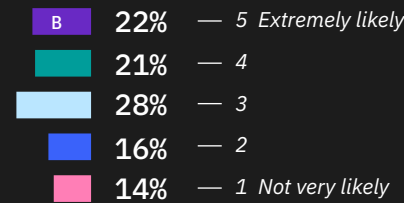
Total n=604, RPA users n=189, non-RPA users n=415

**A/B** Significant difference at the 95% level

#### Total



#### RPA users (A)



#### Non-RPA users (B)

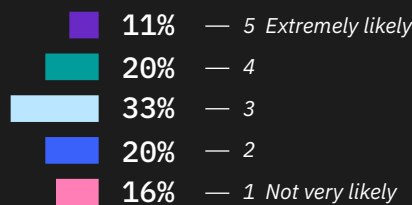


Figure 11

Q16. How likely are you to switch [INSERT "RPA" IF RPA USER] automation providers in the next year?

**Ranked importance of automation/RPA provider attributes**

Total n=604, RPA users n=189, non-RPA users n=415

	Ranked 1st	2nd	3rd	4th	5th
Technical support	6%	11%	8%	7%	8%
Competitive price	9%	7%	8%	7%	8%
Integrates easily with my business processes	11%	7%	8%	4%	7%
Easily scalable	8%	8%	6%	7%	7%
Ability to integrate with existing/legacy systems	5%	7%	7%	10%	7%
Proven return on investment (ROI)	8%	8%	5%	8%	6%
Ability to meet our regulatory and compliance requirements	6%	5%	8%	8%	7%
Easy to do business with	8%	5%	7%	8%	5%
Integrates AI capabilities	7%	7%	6%	5%	6%
Industry expertise	7%	6%	7%	5%	6%
Process expertise	6%	5%	5%	6%	7%
Provides market leading security	4%	5%	4%	7%	6%
Used/trusted by many well-known companies	3%	6%	4%	4%	4%
Large portfolio of automation solutions	3%	4%	3%	4%	6%
Relevant use cases	3%	4%	4%	4%	3%
Existing relationship with the provider	4%	2%	4%	3%	2%
Use of agnostic approach (open standards/ open source)	2%	2%	3%	3%	3%

Figure 12

Q15. Which of the following attributes are most important in selecting an [INSERT “RPA” IF RPA USER] automation provider? Please rank the 5 most important attributes from this list.

Ranked importance of automation/RPA provider attributes (% ranked in top 5)

**A/B** Significant difference at the 95% level

	TOTAL	ROLE	
		IT (A)	LOB (B)
Technical support	41%	38%	44%
Competitive price	40%	36%	44% A
Integrates easily with my business	38%	36%	40%
Easily scalable	37%	41% B	32%
Ability to integrate with existing/legacy systems	36%	33%	39%
Ability to meet regulatory and compliance requirements	34%	33%	36%
Proven return on investment (ROI)	34%	35%	33%
Easy to do business with	33%	31%	36%
Integrates AI capabilities	31%	33%	28%
Industry expertise	31%	31%	30%
Process expertise	29%	28%	31%
Provides market leading security	26%	30%	23%
Used/trusted by many well-known companies	22%	24%	19%
Large portfolio of automation solutions	20%	18%	21%
Relevant use cases	19%	19%	18%
Existing relationship with the provider	16%	17%	16%
Use of agnostic approach (open standards/open source)	14%	17% B	10%

Figure 13

Q15. Which of the following attributes are most important in selecting an [INSERT “RPA” IF RPA USER] automation provider? Please rank the 5 most important attributes from this list.

**Driving factors for switching vendors (among those who are likely to switch in the next year)**

Total n=207, RPA users n=80, non-RPA users n=127

**A/B** Significant difference at the 95% level

	RPA users (A)	Non-RPA users (B)
Improved functionality to meet our needs	29%	43% A
Ability to customize/flexibility	36%	36%
Looking for a better price	30%	39%
Ability to handle end-to-end projects from strategy to implementation	38%	29%
Need better customer service and support	28%	35%
Looking for improved product performance	31%	32%
Ability to support and integrate our broader technology needs	31%	31%
Enhanced security capabilities	34%	27%
Need something easier to use/learn	28%	29%
Regulatory and compliance knowledge	25%	29%
Need for global deployment/support	31%	24%
Industry-specific knowledge/offerings	30%	24%
Leading-edge/innovative offerings or features	25%	26%
Better cadence of refreshes/updates	29%	23%
Desire for compatibility with other infrastructure	21%	24%
Desire to consolidate to another platform and/or suite or products	29%	18%
Moving to a cloud platform/cloud services provider	33% B	16%
Breadth of ecosystem	24%	20%

Figure 14

Q17. [ASK IF Q16=4-5] What factors are driving you to switch vendors?

### Where automation solutions are deployed

Total n=604, RPA users n=189, non-RPA users n=415

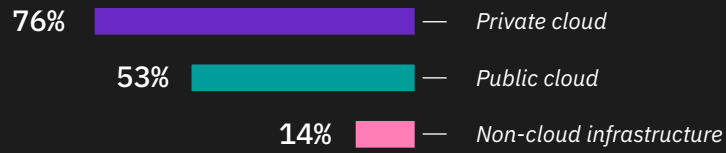


Figure 15

Q22. Where do you deploy your automation solutions?

### Same or different vendors used for automation/cloud solutions

Total n=604, RPA users n=189, non-RPA users n=415

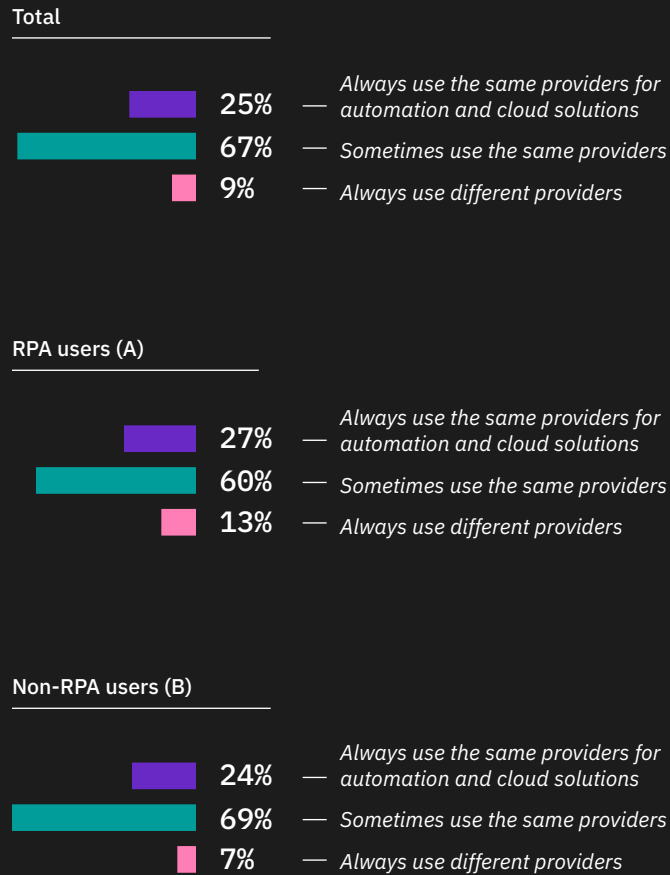


Figure 16

Q21. Do you use the same or different vendors for automation and cloud solutions?

**Preference for single vs. multiple automation solutions (platform vs. best of breed)**

Total n=604, RPA users n=189, non-RPA users n=415

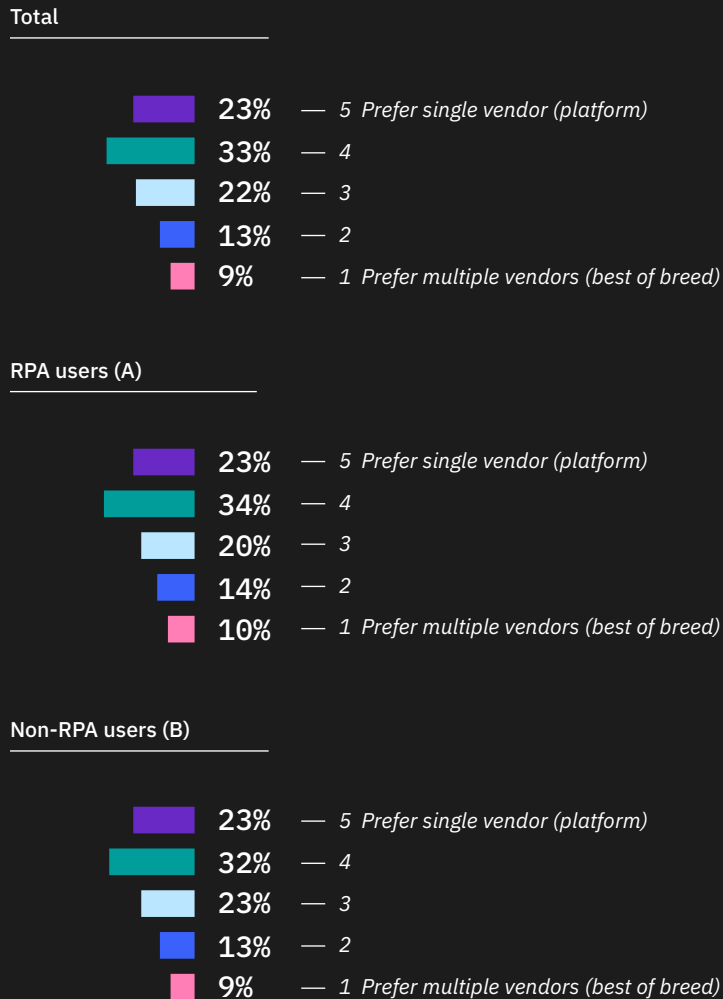


Figure 17

Q20. Do you prefer to buy automation solutions from a single vendor (platform) or from multiple vendors (best-of-breed approach)?