

STATE OF INTELLIGENT AUTOMATION REPORT | SEPTEMBER 2023

# Global Economic Impact on AI Priorities

**ABBYY**

# Table of Contents

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01

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Key findings

02

---

Individual question  
analysis

03

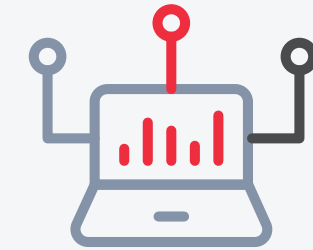
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Overview of global  
respondents

# Key Findings



The average global investment in intelligent automation in 2022 was between \$190k-\$379k USD



82% of organizations saw a budget increase for intelligent automation projects in 2023, despite an uncertain economic climate



Despite an uncertain economy, on average, 48% of respondents said they are more likely to invest and 57% are still expecting 2x the investment cost, yet only 47% have actually achieved 2x ROI



60% of respondents said employee happiness increased, alongside productivity, customer service and work-life balance



51% of respondents identified quality products/projects and faster delivery as some of the key benefits for customers; pricing reduction was least rated



Customer experience is the key revenue generating process for 41% of respondents



89% of respondents have long-term plans for AI with 37% having a near-term 3-to-5-year plan



Monitoring software, intelligent document processing platforms, and data analysis and insights are the most utilized technologies



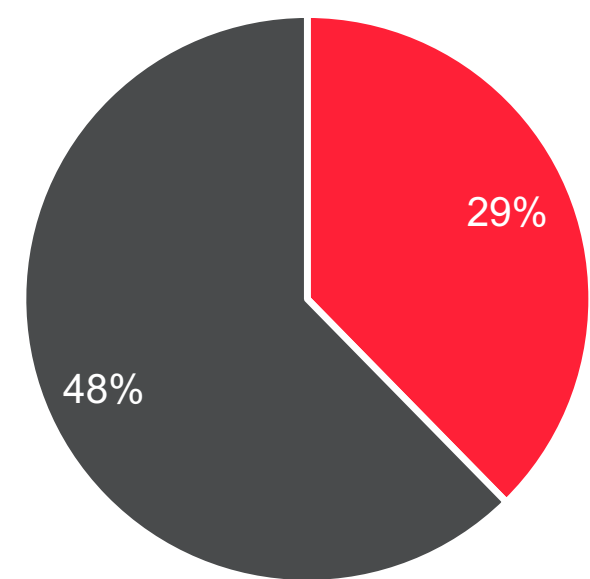
If IT budget had no constraint, respondents would invest more in sales processes (44%), inventory management (43%) and customer experience (42%)

# Individual Question Analysis

# How has uncertainty about the economy influenced your plans to invest in automation/innovation? Select one

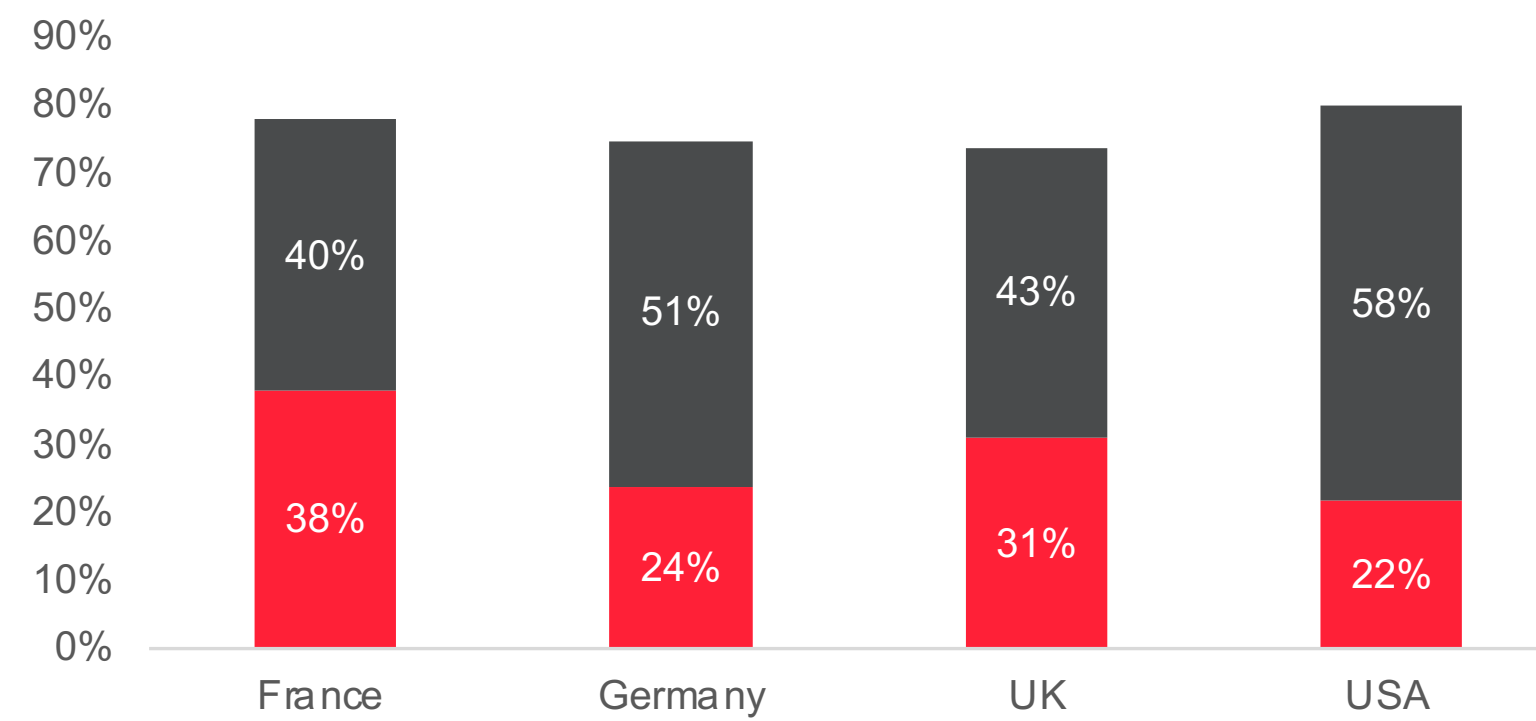
Despite an uncertain economy, on average, 48% of respondents say they are more likely to invest.

Global responses



■ % Less likely to invest ■ % More likely to invest

Country split



■ % Less likely to invest ■ % More likely to invest

- The highest percentage is driven by the USA, where 58% of respondents said they are more likely to invest.
- France sees the lowest percentage, with 40% of respondents looking to invest in the future.
- 59% of those in organizations with 1000-1999 employees and 56% of those in organizations with 4000-4999 say they plan on investing, indicating the higher stability of larger organizations.
- When examining industries, Manufacturing is leading, with 65% interested in investing. Government/Public Sector and Education are the industries with the lowest interest registered.

# How much has your business invested in intelligent automation in the last 12 months?

Unsurprisingly, there is a direct correlation of size between organization size and investment value. The larger the organization, the higher the investment.

	Total	France	Germany	UK	USA
Less than €90,000	18%	22%	14%	17%	18%
€90,000 to €149,999	19%	22%	25%	21%	10%
€150,000 to €299,999	22%	17%	20%	20%	30%
€300,000 to €649,999	17%	14%	16%	16%	24%
€650,000 to €2,600,000	13%	13%	12%	16%	12%
€2,600,000 or more	6%	8%	6%	6%	3%
Not sure	5%	4%	8%	4%	3%

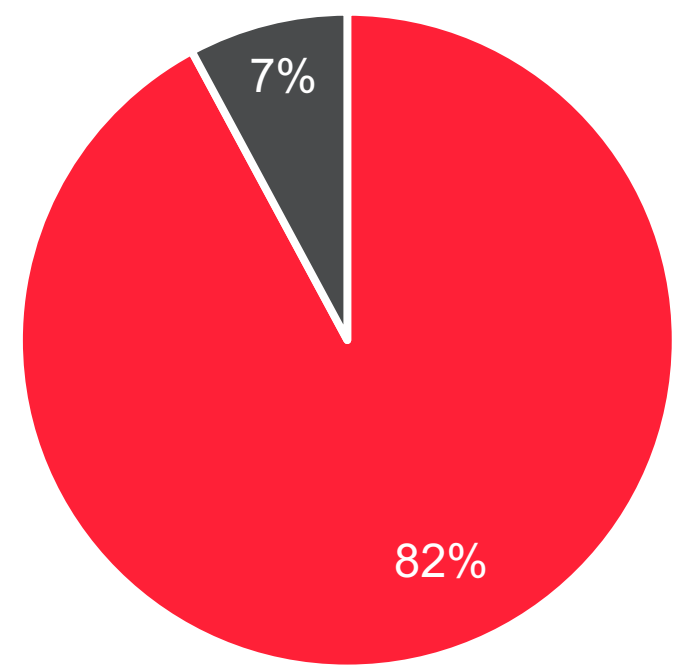
- The average global investment over the last year was between \$190k-\$379k, with a higher weight in the US, whereas European markets seem to be more conservative and investing under \$190k.
- While the majority of industries are still in the ‘less than \$114k’ bracket, Insurance/Accounting and Manufacturing see higher percentage of investment – on average 33% investing \$190k-\$379k and \$380k-\$823k respectively.



# How has your organization's budget for intelligent automation projects changed over the last 12 months? Select one

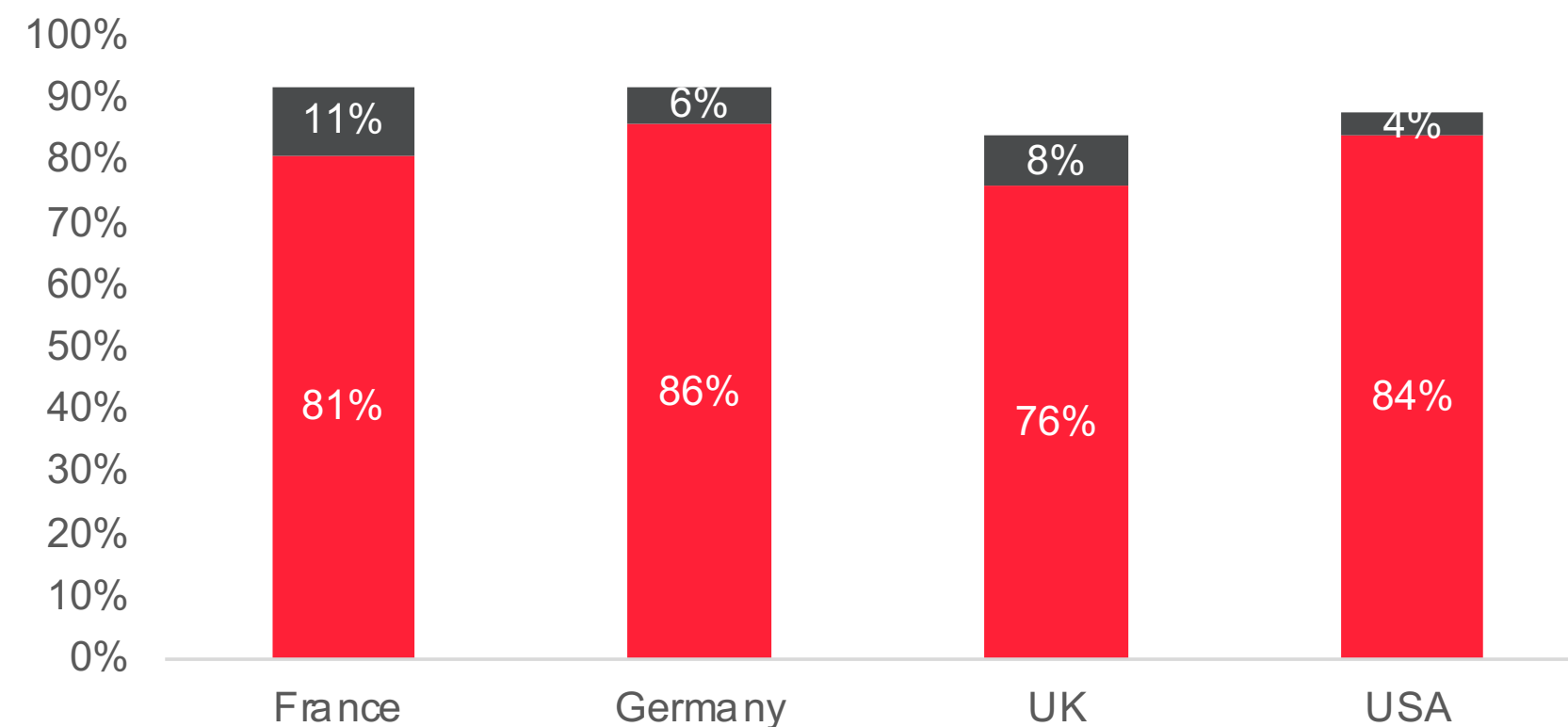
The budget for intelligent automation has increased for 82% of respondents.

Global responses



■ % Increased ■ % Decreased

Country split



■ % Increased ■ % Decreased

- The average highest increase bracket was between 6%-16%, according to 33% of respondents.
- An increase has been reported across all organization sizes. Interestingly, the small organizations with less than 250 employees are seeing some bigger increases, with 17% of them seeing an increase between 16%-35% - indicating growing recognition from small organizations that AI can help them level the field with larger enterprises.
- Wholesale and Real Estate are two of the leading industries, with an average of 90% of respondents within these industries saying their organization's budget has increased.
- Budget for Wholesale organizations saw an increase of 16%-35%, ahead of all other organizations.

# What was the anticipated ROI from investments in Intelligent Automation projects?

Similarly to responses we recorded in 2022 on this topic, the majority of respondents and their organizations across all countries have had an expectation of 2x the cost of investment.

	Total	France	Germany	UK	USA
At least 1x cost of investment	24%	30%	26%	24%	16%
At least 2x cost of investment	57%	50%	54%	57%	66%
At least 3x cost of investment	11%	12%	8%	14%	10%
We had no expectations	8%	8%	12%	6%	7%

- On average, 57% respondents anticipated seeing at least twice the cost of investment ROI.
- Only 8% had no expectations and 11% expected to see 3x the investment cost.
- This was an overall common expectation across all markets and organization sizes.
- When analyzing industries, the majority of respondents expected an average of 2x cost investment, but Telecoms had the highest expectations of 3x investment cost – 29%, ahead of all other industries.
- Levels of expectations were similar to last year, when 62% of respondents said they were expecting at least 2x cost of investment.



# What ROI has it delivered?

When analyzing what the ROI actually was, it rose to expectations, with 47% of respondents saying they saw at least 2x the cost of investment. This was slightly higher in the US and Germany.

	Total	France	Germany	UK	USA
At least 1x cost of investment	31%	33%	28%	32%	31%
At least 2x cost of investment	47%	41%	51%	44%	53%
At least 3x cost of investment	12%	16%	12%	13%	8%
Lower than expected	9%	9%	8%	12%	8%

- It is interesting to note that bigger organizations saw a higher number of responses for 2x cost of investment, whereas smaller organizations (less than 1000 people) saw slightly lower averages.
- From an industry perspective, Telecom had the highest expectations of 3x cost of investment, but the highest percent of respondents said they saw 2x cost of investment.
- Wholesale as an industry saw the highest number of respondents who said they had at least 2x the cost of investment (62%).
- Similar to the expectations, the outcome of last year was comparable - 43% saw at least 2x the cost of investment.

# Does your company use any of the following technologies? Select all that apply

Monitoring software, intelligent document processing platforms, and data analysis and insights are the most utilized technologies, however AI and mobile productivity apps are also recognized by respondents.

	Total	France	Germany	UK	USA
Monitoring software (software that monitors processes and how you complete tasks)	58%	49%	56%	60%	66%
Intelligent document processing platforms (automatic digitization of documents)	53%	42%	56%	57%	58%
Data analysis and insights (e.g. Tableau, Power BI, Qlikview)	53%	45%	50%	56%	60%
Artificial Intelligence	52%	42%	51%	57%	58%
Mobile productivity apps (e.g. mobile app scanners or PDF converters)	50%	40%	46%	58%	56%
None of the above	2%	4%	2%	0%	1%

- Unsurprisingly, the larger the organization, the more technologies are being used. Technologies are utilized the most in organizations with 4000-4999 employees (an average of 66% vs an average of 44% in an organization with 250-299 employees).
- Manufacturing, Software/Technology and Hospitality are the biggest adopters of the listed technologies, whereas Agriculture and Government/Public Sector see the lowest percentage.
- Compared to 2021, there has been an increase in companies using all technologies except for mobile productivity apps (decrease by 1%). Monitoring software (15%) and AI (12%) saw the largest increase in adoption.
- In 2023, we are seeing more focus on monitoring software and intelligent document processing platforms, whilst AI is still a key focus area for respondents in their organizations - compared to 2019, where AI and automation systems were the top solutions implemented by respondents.

# In which departments do you use Artificial Intelligence?

Of those who identified AI as a technology used, its biggest use is in Operations and Marketing departments, alongside Product Development and Sales.

Dept	AI	Intelligent document processing	Monitoring software	Mobile productivity apps	Data analysis and insights
Operations	50%	43%	43%	43%	41%
Marketing	48%	35%	34%	40%	46%
Product Development	45%	38%	35%	35%	42%
Sales	45%	44%	41%	48%	47%
Logistics	40%	38%	38%	34%	37%
Risk mitigation/management	35%	36%	38%	27%	36%
HR	34%	40%	32%	38%	34%
Procurement	28%	33%	29%	28%	32%
Accounts Payable	25%	37%	31%	28%	32%
Legal & Compliance	20%	28%	28%	23%	26%
Other	1%	0%	1%	1%	1%

- In Sales including customer engagement, there has been a 22% increase in the number of respondents implementing AI, which likely includes Large Language Models, and a 15% increase in IDP.
- It is also interesting to note that in 2019, the implementation of automation was prioritized in more essential departments such as IT and Accounting, according to our 2019 survey. Only 13% of respondents in the UK at the time had said they had implemented AI in Sales – the same as in the Marketing department. This indicates the success and evolution of AI technologies and organizations seeing the benefits and ROI.
- Intelligent document processing is more commonly used in Ops and Sales, as well as Logistics and less in Legal & Compliance. Similarly, both process monitoring software and mobile productivity apps are used in Operations, Logistics and Risk Mitigation/management departments.
- Data analysis and insights technology is used more in Sales, Marketing and Product Development.



# Since implementing intelligent automation, which of the following has been achieved?

When looking at the benefits of implementing such technology, 52% of respondents have identified improved efficiency, 48% saw increased productivity and 38% saw improved customer service.

	Total	France	Germany	UK	USA
Improved efficiency	52%	48%	48%	53%	57%
Increased productivity	48%	40%	48%	50%	54%
Improved customer service	38%	38%	36%	37%	42%
Reduced work stress	36%	31%	34%	38%	41%
Grew revenue	36%	26%	41%	32%	45%
Improve work/life balance	32%	22%	27%	38%	42%
Increased market share/ get ahead of the competition	27%	24%	23%	27%	35%
Transformed business	27%	25%	28%	24%	30%
Reduced headcount	19%	14%	18%	22%	22%
Other	0%	0%	-	-	0%
Nothing changed	2%	3%	4%	1%	2%
Don't know	1%	1%	1%	1%	1%

- While these are all valid across all markets surveyed, it's interesting to note the US listed revenue growth, improved work/life balance and reduced work stress as the main benefits.
- Smaller organizations (less than 250 employees) have seen a higher percentage of responses for increased productivity and efficiency, as well as improved customer service and reduced work stress. Bigger organizations (4000-4999 employees) saw a more even split of benefits (those listed above), as well as business improvements such as increase in market share or transformed business.
- For the majority of industries, improved efficiency and increased productivity were the biggest benefits.

# How has employee satisfaction changed since your organization started implementing intelligent automation?

For just under 50% of respondents, overall employee satisfaction has increased exponentially since their organization started implementing intelligent automation.

	Staff retention	Employee happiness	High value/interesting work carried out	Employees leaving the office on time	Innovation from employees
Decreased a lot	5%	3%	5%	4%	4%
Decreased somewhat	10%	8%	8%	9%	8%
Stayed the same	36%	27%	27%	37%	29%
Increased somewhat	31%	41%	39%	32%	39%
Increased a lot	19%	21%	21%	18%	20%
<b>% Increased</b>	<b>49%</b>	<b>62%</b>	<b>60%</b>	<b>50%</b>	<b>59%</b>

- According to 62% of respondents, employee happiness increased.
- 60% said higher value work has been carried out and 59% of respondents have said the innovation from employees has increased.

# What benefits are customers seeing since you introduced intelligent automation? Select all that apply

Higher quality products/projects and faster delivery were identified as key benefits by 51% of respondents.

	Total	France	Germany	UK	USA
Higher quality (products/projects)	51%	42%	52%	50%	62%
Faster delivery (project or products)	51%	41%	48%	55%	60%
Higher predictability (products received/projects completed on time)	45%	43%	40%	46%	52%
Increased choice (more products and services offered)	37%	32%	31%	39%	48%
More input from senior management	31%	27%	27%	33%	36%
Reduced prices	29%	30%	28%	27%	31%
Other	0%	-	0%	-	-
Customers have not seen any benefits	3%	3%	4%	2%	0%

- The US scored these benefits ahead of the other markets, whereas France was more reserved. These benefits are most agreed upon across organizations of all sizes and across all industries.
- Higher predictability was another key benefit identified by 45% of respondents - again, a higher percentage in the US vs other markets
- Price reduction was the least rated benefit identified by respondents, with similar levels across all markets.



# What has been the biggest barrier to the uptake of intelligent automation amongst employees? Select one

When looking at barriers for intelligent automation adoption, there are some slight differences by country with most countries agreeing that the biggest barrier is the tendency to maintain the ‘old’ way of doing things, according to 31% of respondents.

	Total	France	Germany	UK	USA
Tendency to maintain 'old' ways of doing things	31%	33%	36%	23%	32%
Limited training	24%	17%	18%	32%	27%
Cultural resistance to modernize	20%	18%	20%	24%	19%
Unclear on what it can be used for	14%	21%	16%	10%	10%
Other	0%	-	-	1%	-
There have been no barriers	11%	11%	11%	9%	12%

- That is similar for France, Germany and the USA. However, in France, 21% of respondents say the second biggest barrier is ‘unclear on what it can be used for.’
- 21% of German respondents say the second biggest barrier is the cultural resistance to modernize.
- The UK sees limited training as the biggest barrier, according to 32% of respondents. 24% also say there is a cultural resistance to modernize.

# Which areas are negatively affected by cutting IT investments or not renewing software licenses? Select all that apply

By cutting IT investments or not renewing software licenses, 34% of respondents say they believe employee productivity is negatively affected.

	Total	France	Germany	UK	USA
Employee productivity	34%	30%	34%	34%	40%
Intelligent Document Processing	30%	24%	29%	30%	37%
Enhancing customer experience	29%	26%	23%	30%	38%
Moving to Cloud	29%	26%	28%	28%	33%
Process intelligence	27%	28%	29%	25%	27%
Competitive advantage	27%	27%	24%	30%	28%
Employee morale	26%	21%	24%	32%	27%
RPA	18%	19%	22%	13%	20%
Other	1%	0%	0%	2%	0%
I don't know	7%	7%	10%	5%	8%

- This is seen across all markets and organizations of all sizes.
- A larger proportion of bigger organizations (with over 4000 employees) are also reporting moving to cloud as an area that is negatively affected by cut investments and non-renewals.
- Larger organizations are also recognizing the impact on competitive advantage and employee morale.

# Does your business have a solid AI strategy in place? Select one

On average, 37% of respondents say their organization has a 3-5 year plan for an AI strategy, while 27% say they have a 2-year plan.

	Total	France	Germany	UK	USA
Yes, we have a 1-year plan	13%	14%	10%	15%	13%
Yes, we have a 2-year plan	27%	26%	24%	25%	35%
Yes, we have a 3-5-year plan	37%	34%	40%	36%	38%
Yes, we have a 6-10-year plan	8%	8%	9%	10%	5%
Yes, we have a 11+ year plan	4%	8%	3%	4%	1%
No, we don't have a plan in place	11%	10%	14%	10%	8%

- Larger organizations have a lengthier 3–5-year plan, whereas smaller organizations (under 1000 employees) have a higher percentage of respondents saying a 1-year or 2-year plan.
- A 3–5-year plan is the most reported length across the majority of industries as well.
- Similar to the responses we recorded in 2019, 5 in 10 respondents had a 2-5 year plan and strategy for AI, indicating the complexity and scale of such projects and technologies.

# Which of the following are you planning to do in the next 12 months to increase business performance? Select all that apply

46% of respondents have said they plan on increasing intelligent automation and 38% want to increase marketing programs.

	Total	France	Germany	UK	USA
Increase intelligent automation	46%	42%	42%	51%	51%
Increase marketing programs	38%	30%	36%	42%	45%
Move to Cloud	34%	27%	41%	32%	35%
Decrease other costs (e.g., rent, software subscriptions, etc.)	33%	36%	32%	30%	35%
Increase sales teams	32%	28%	29%	33%	40%
Move to Low-Code-No-Code	21%	18%	21%	22%	22%
Reducing non sales related staff	21%	20%	19%	22%	22%
We have no specific plans	4%	5%	4%	4%	3%

- Only 22% have said they plan on reducing non sales related staff.
- Increasing intelligent automation is a key priority across organizations of all sizes. For larger organizations with 5000+ employees, as well as for those with under 250 employees, a key priority will also be to decrease costs such as rent and software subscriptions.



# Which of the following revenue generating processes are you focused on automating/prioritizing in 2023?

Customer experience is the key revenue generating process for 41% of respondents this year.

	Total	France	Germany	UK	USA
Customer experience	41%	40%	35%	43%	46%
Sales processes	39%	32%	44%	40%	38%
Inventory management	35%	32%	33%	29%	44%
Customer resource management	34%	25%	33%	31%	45%
Customer onboarding	32%	30%	28%	34%	36%
Accounts payable automation	32%	28%	28%	38%	33%
Other	0%	0%	-	-	-
None of the above	3%	3%	3%	3%	2%

- 39% have also said the sales process is a big focus. These priorities are similar across surveyed markets; however, the US has also added higher emphasis on inventory management and customer resource management.
- It is interesting to note that smaller organizations of 250 or less want to prioritize customer experience and sales processes, whereas larger organizations with 3000-3999 employees want to take a more balanced approach, focusing equally on customer experience, inventory management and customer resource management.

# If budget were not a constraint, where would you invest IT budget? Select all that apply

If budget were no constraint, respondents would invest their IT budget in sales process (44%), inventory management (43%) and customer experience (42%).

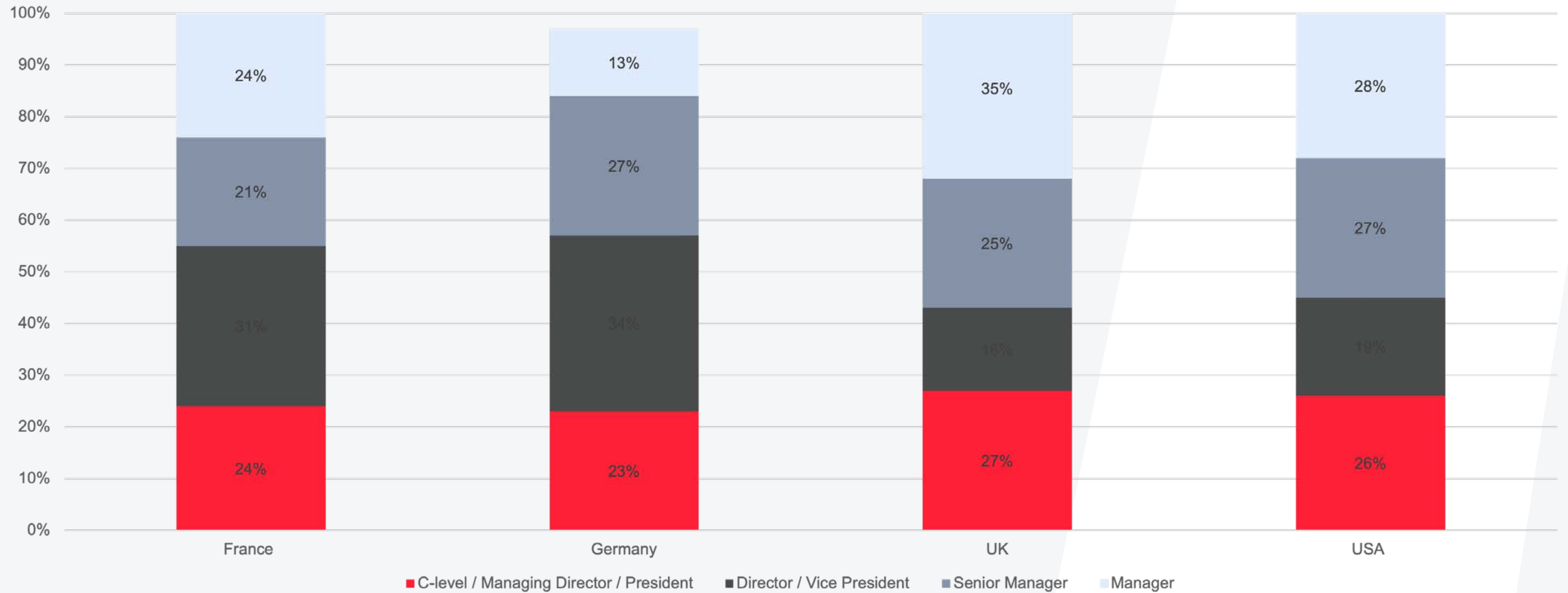
	Total	France	Germany	UK	USA
Sales processes	44%	37%	46%	46%	45%
Inventory management	43%	37%	48%	41%	46%
Customer experience	42%	38%	33%	50%	48%
Customer resource management	38%	30%	34%	39%	49%
Accounts payable automation	36%	32%	37%	36%	38%
Customer onboarding	35%	36%	31%	35%	39%
Other	1%	1%	1%	0%	-

- These are seen as the top priority areas across organizations of all sizes.
- Unsurprisingly, those organizations with more customer facing roles such as Retail or Healthcare would focus more on customer experience, whereas those in more operational sectors, such as Utilities, would focus more on investing in inventory management.
- The UK would be more interested in focusing on sales processes and customer experience. Germany would focus on sales processes and inventory management.

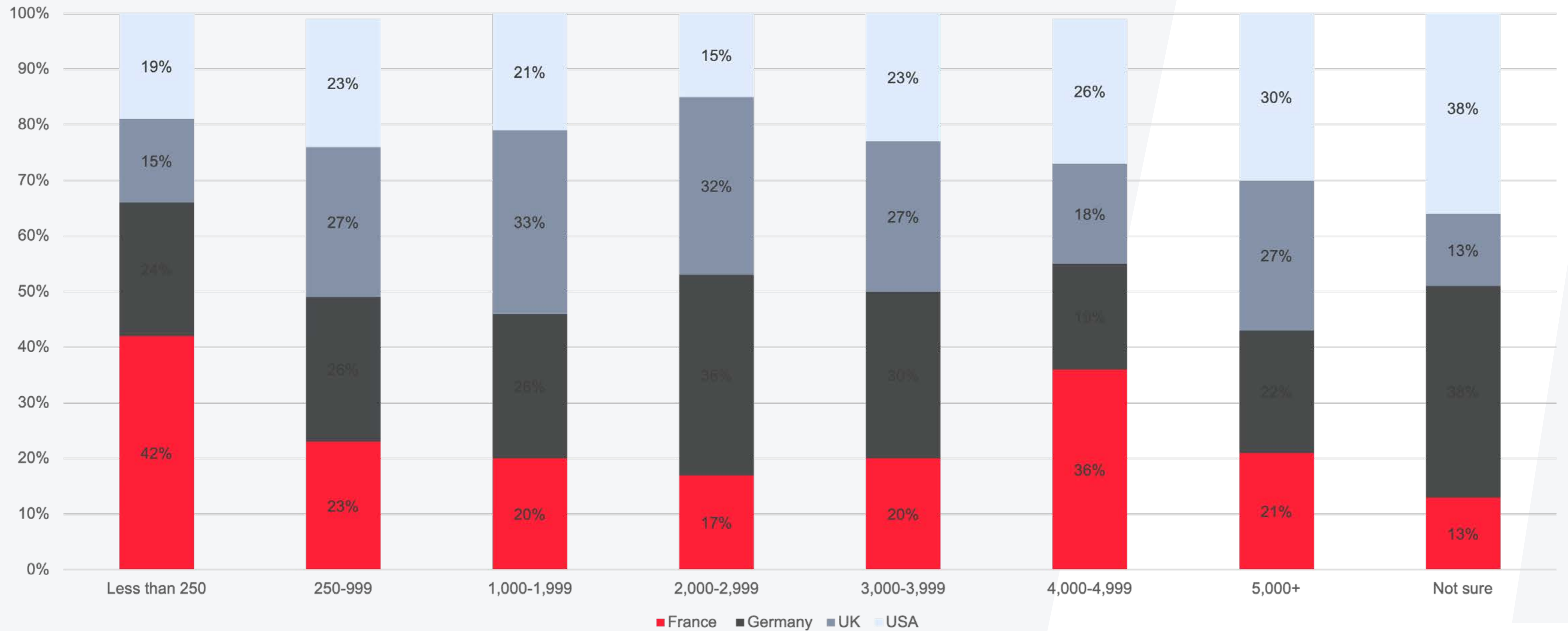


# Overview of global respondents

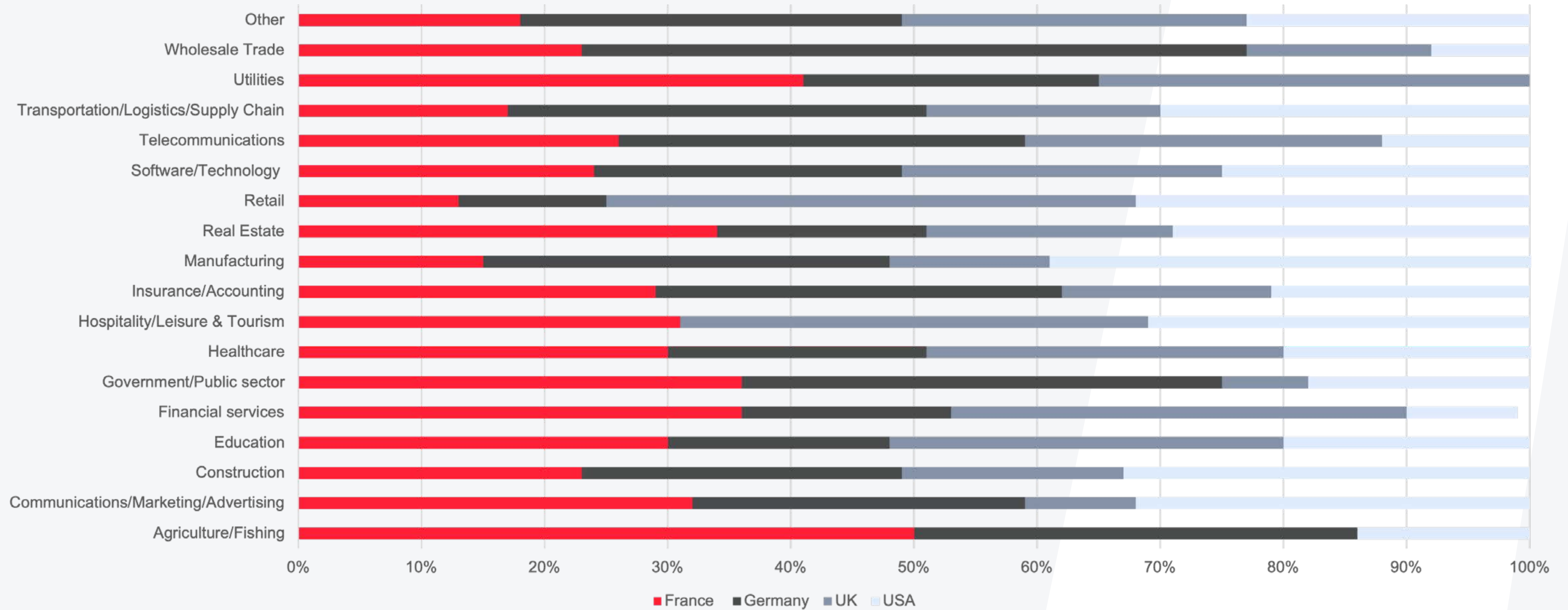
# What's your current job level?



# How many people work within your organization?



# In which of the following sectors do you work?





# Global Results

## Survey Methodology

This research was conducted by Sapio Research in July 2023 on behalf of ABBYY. 1000 IT decision makers from 17 industries including financial services, healthcare, transportation/ logistics/ supply chain, insurance, government/public sector, and healthcare were surveyed across the US, UK, Germany, and France to understand how the current global economic stagnation is impacting investments in intelligent automation. The survey also looked at what technologies, if any, organizations plan to adopt in the near future





## About **ABBYY**

ABBYY puts your information to work. We combine innovation and experience to transform data from business-critical documents into intelligent actionable outcomes in over 200 languages in real time.

We enable more than 10,000 companies globally, including many of the Fortune 500, to drive significant impact where it matters most: customer experience, operational excellence, and competitive advantage. ABBYY is a global company with headquarters in Milpitas, California, USA, and offices in 14 countries.





## ABBYY Vantage

[ABBYY Vantage](#) is a comprehensive platform that applies AI to understand your documents in a fast and simple way. Vantage makes today's digital worker and processes smarter by delivering skills that read, understand, and extract insights from documents, helping enterprises accelerate digital transformation.

## ABBYY Marketplace

The [ABBYY Marketplace](#) provides a rich collection of document skills, connectors, and assets, which enhance and extend the ABBYY Vantage platform and accelerate the digital transformation and automation initiatives of enterprises of any size, industry, and geography. Skills developed both by ABBYY and by the ABBYY partner network cover various document types, use cases, and languages and can be either fully trained and ready to go, or a framework, providing the basis for customers to adjust to specific requirements and train their own document skills.

## ABBYY Timeline

[ABBYY Timeline](#) features advanced process mining and task mining technology using the latest artificial intelligence (AI). It enables businesses to automatically build an interactive digital twin of their processes, analyze them in real time to identify bottlenecks, and predict future outcomes to facilitate decision-making of technology investments.

## ABBYY Proof of Identity

[ABBYY Proof of Identity](#) provides an automated solution for both instant document-centric identify proofing and affirmation. Built on the ABBYY Vantage platform and leveraging cognitive services and AI, no longer is there a need to engage with multiple vendors for all the necessary components. The self-service approach allows your customers to use your onboarding and similar processes, anytime and from anywhere. Plus, the out-of-the-box solution is a drop-in component for your existing website or portal, allowing easy integration. Not only does this ensure compliance, it reduces fraud, delivers an excellent customer experience, and ultimately benefits you and your customers.

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