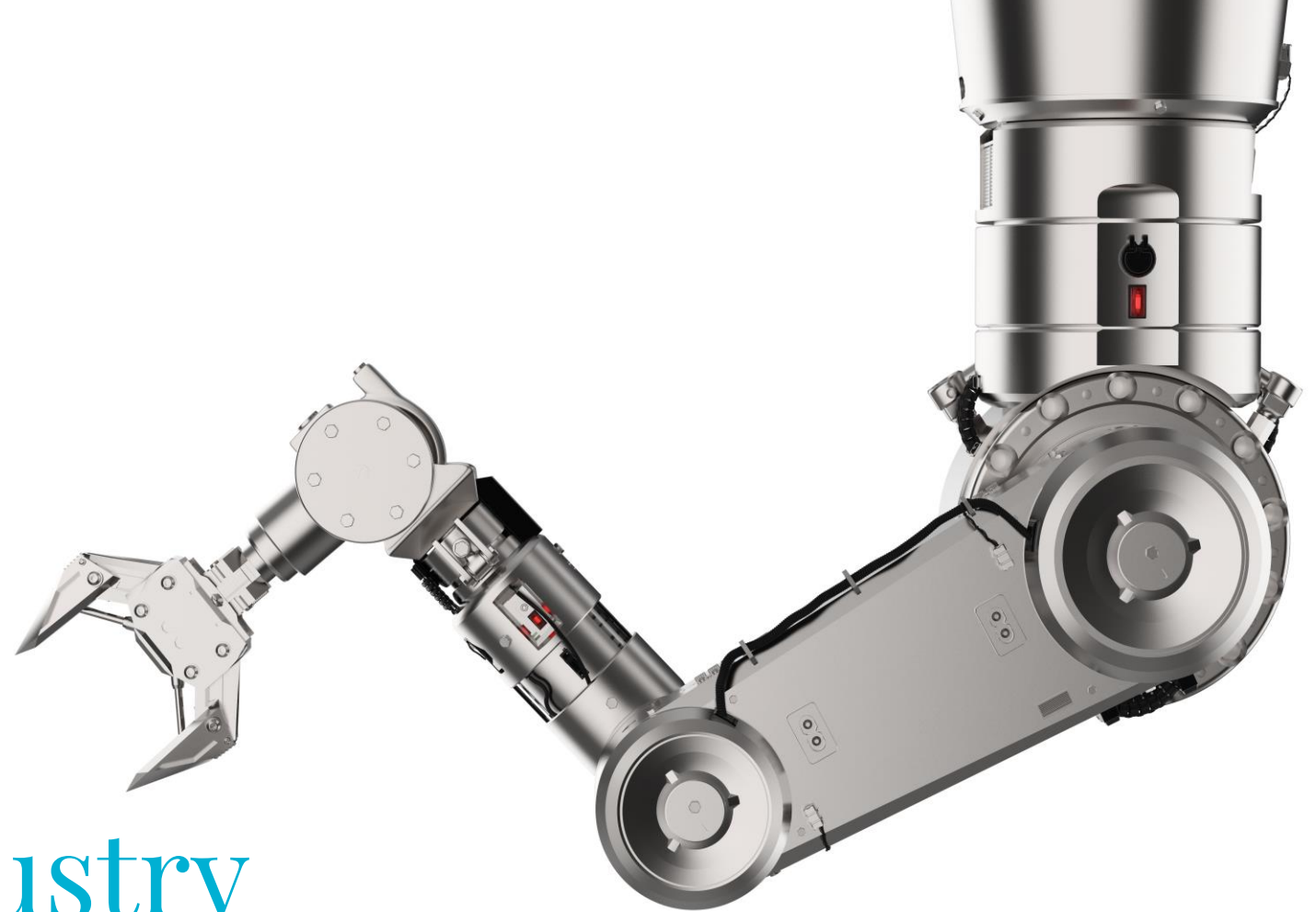




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Spring 2021 Automation Industry Sentiment Survey

PUBLISHED: MARCH 2021



A Virtual Trade Show and Conference
MARCH 22-26, 2021

This survey was conducted by Interact Analysis in partnership with the Association for Advancing Automation (A3) to assess the automation industry's sentiments around current market conditions and perception of future performance.

Over 200 respondents from automation-related companies with combined revenues in excess of \$50 billion responded to the survey.

This survey gathered from Mid-February 2021 to Mid-March 2021 and the results are being released in conjunction with the virtual tradeshow & conference 'Automate Forward' which runs from the 22nd to 26th March 2021.



OFFICIAL RESEARCH PARTNER



Key Findings:

- The automation industry has an overwhelmingly positive outlook for 2021, with headcount, revenue and automation investment expected to grow in excess of 10%.
- Two-thirds of respondents believe that within the next 12 months COVID-19 will no longer negatively impact their business.
- Despite the downturn in vehicle sales, Automotive is expected to be the #1 driver of growth followed closely by Food & Beverage.
- The current turmoil of the pandemic has created a paradox of some companies facing very weak demand, whilst others unable to keep up with demand.
- A large proportion of responses stated that they want to quickly return to trade shows in person with 81% of respondents wanting to return, and most within the next year.
- The industry expects automation investment by customers to grow by an average of 26% in 2021.

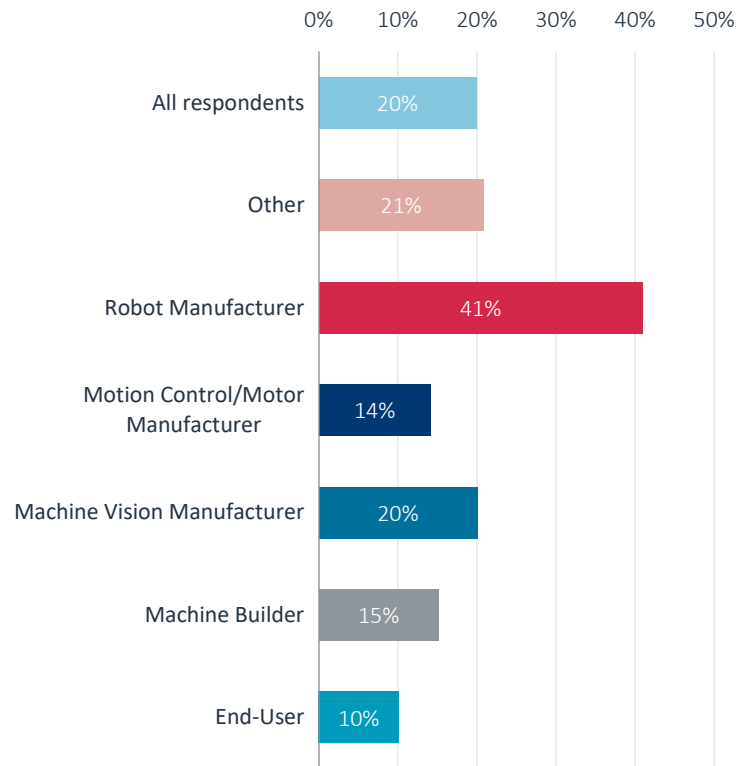
Expected Growth in 2021



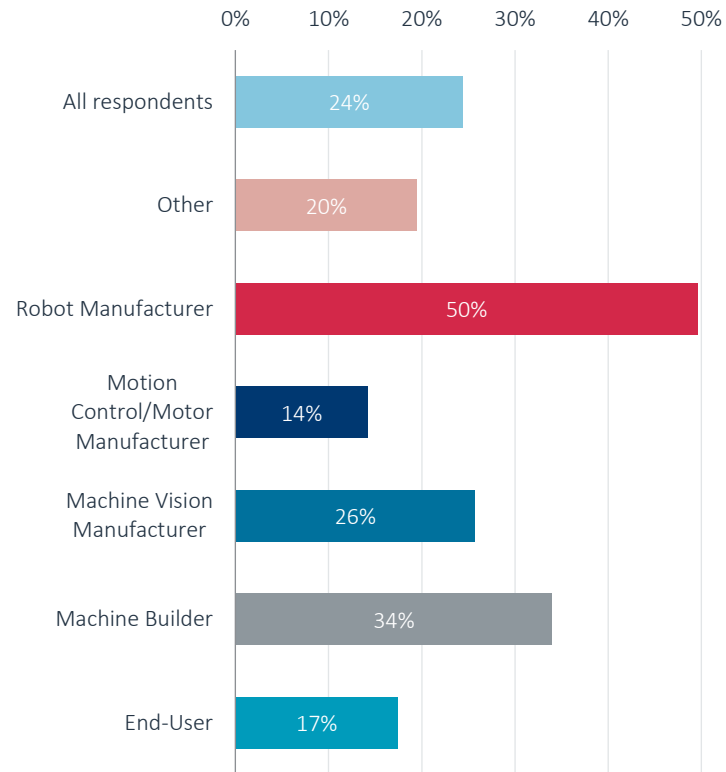
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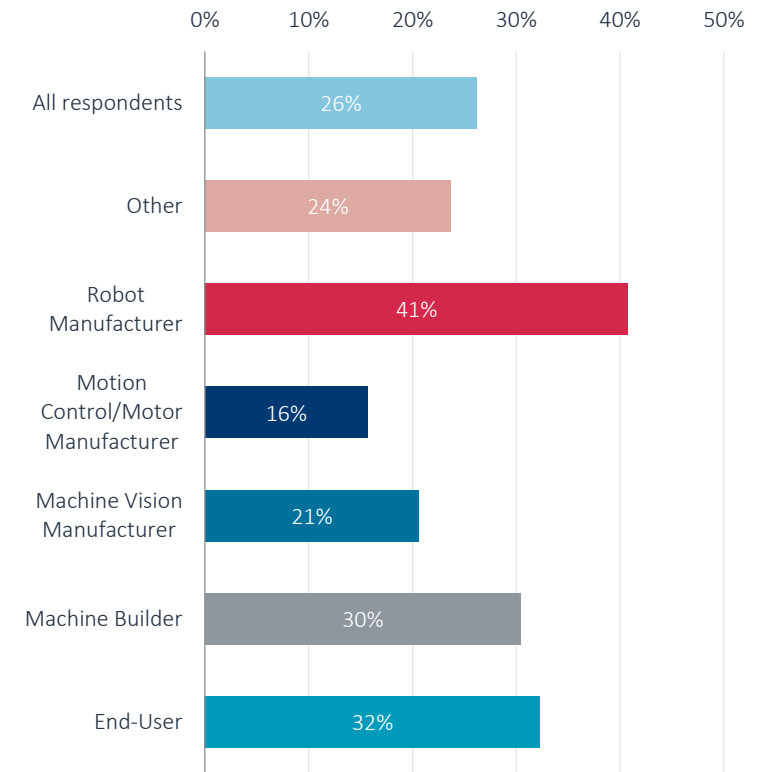
Average Expected Headcount Growth



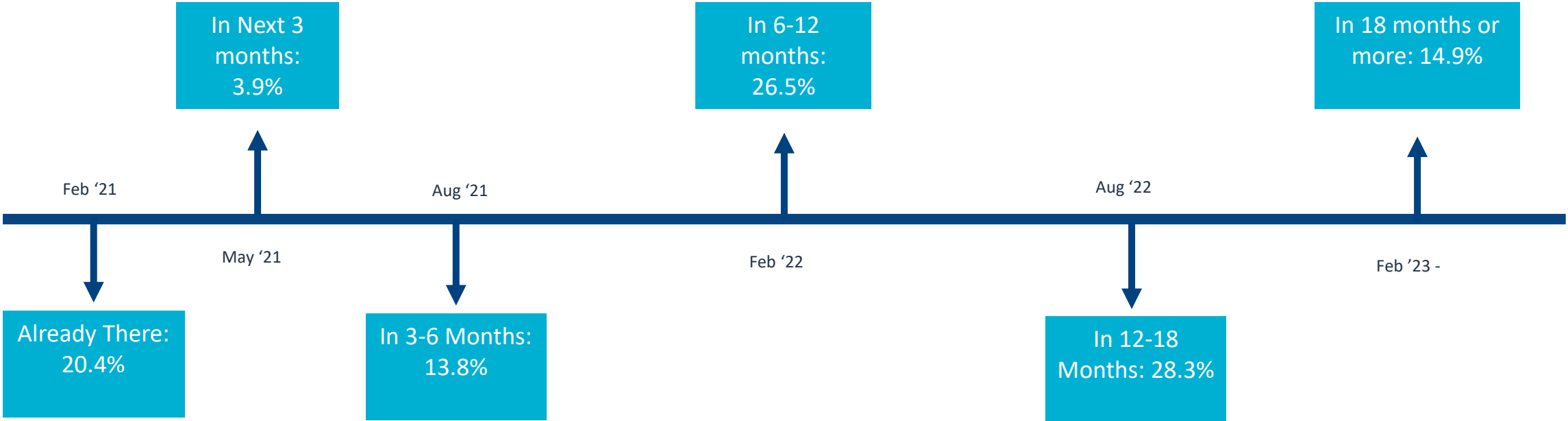
Average Expected Revenue Growth



Average Expected Automation Investment Growth Post-COVID-19



In what timeframe do you expect COVID-19 to have minimal / zero impact on your industry?



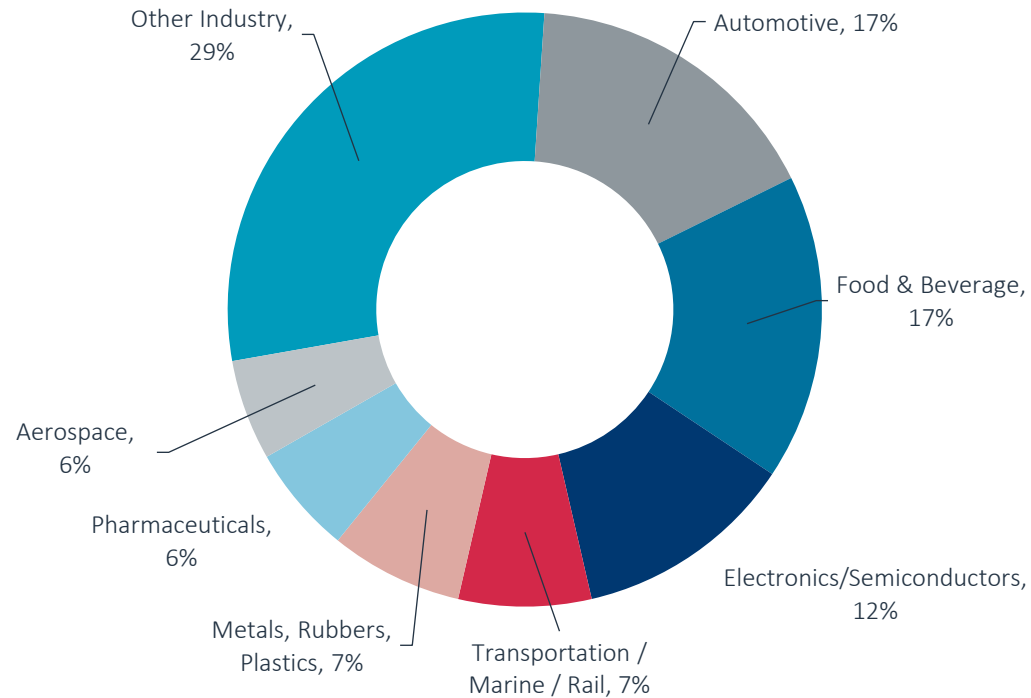
Which 3 end industries do you expect to drive the most growth for your organization in 2021?



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Which Verticals will Drive your Growth in 2021?



	1st	2nd	3rd
End-User / Manufacturing Company	Automotive 28.6%	Electronics / Semiconductors 25%	Automotive 30.0%
Machine Builder	Other Industry 33.3%	Transportation / Marine / Rail 27.3%	Automotive 44.4%
Manufacturer of Machine Vision Products	Automotive 40.0%	Other Industry 30.0%	Electronics / Semiconductors 23.5%
Manufacturer of Motion Control & Motor Products	Food & Beverage 31.8%	Electronics / Semiconductors 18.2%	Other Industry 26.3%
Manufacturer of Robots	Other Industry 30.0%	Food & Beverage 29.4%	Food & Beverage 18.8%
System Integrator/Distributor	Food & Beverage 29.2%	Food & Beverage 21.4%	Electronics / Semiconductors 16.2%
Other	Other Industry 40.0%	Automotive 25.9%	Food & Beverage 31.8%

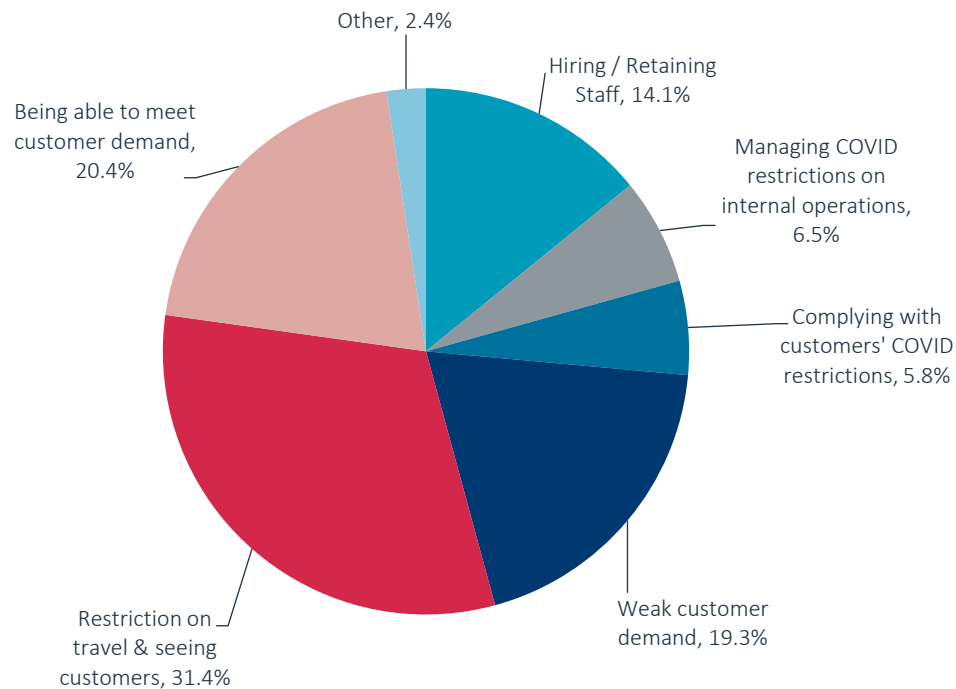
What are the 3 biggest challenges your organization is currently facing?



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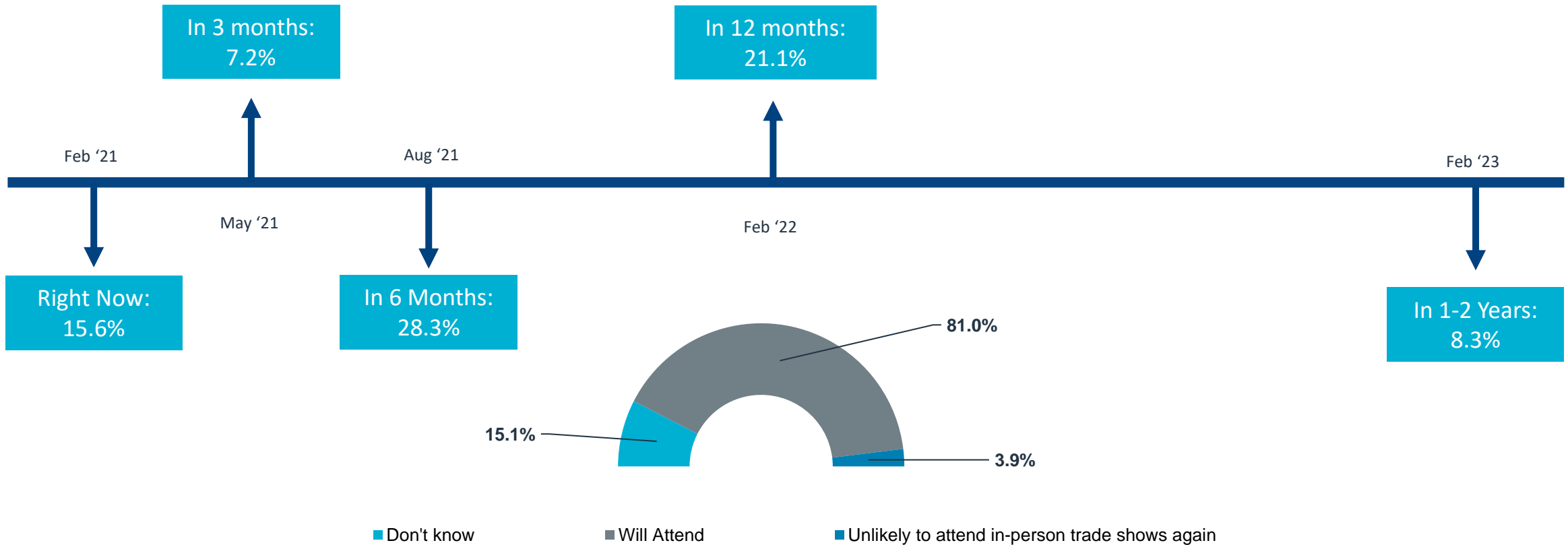
What are the Biggest Challenge Currently Facing your Organization?



What are the Biggest Challenge Currently Facing your Organization?



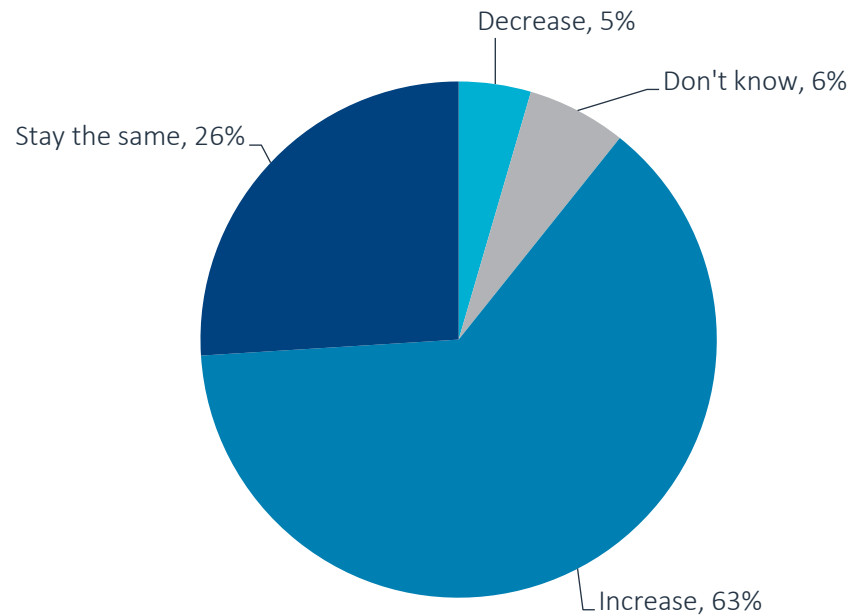
In what timeframe would you be willing to attend an in-person trade show again?



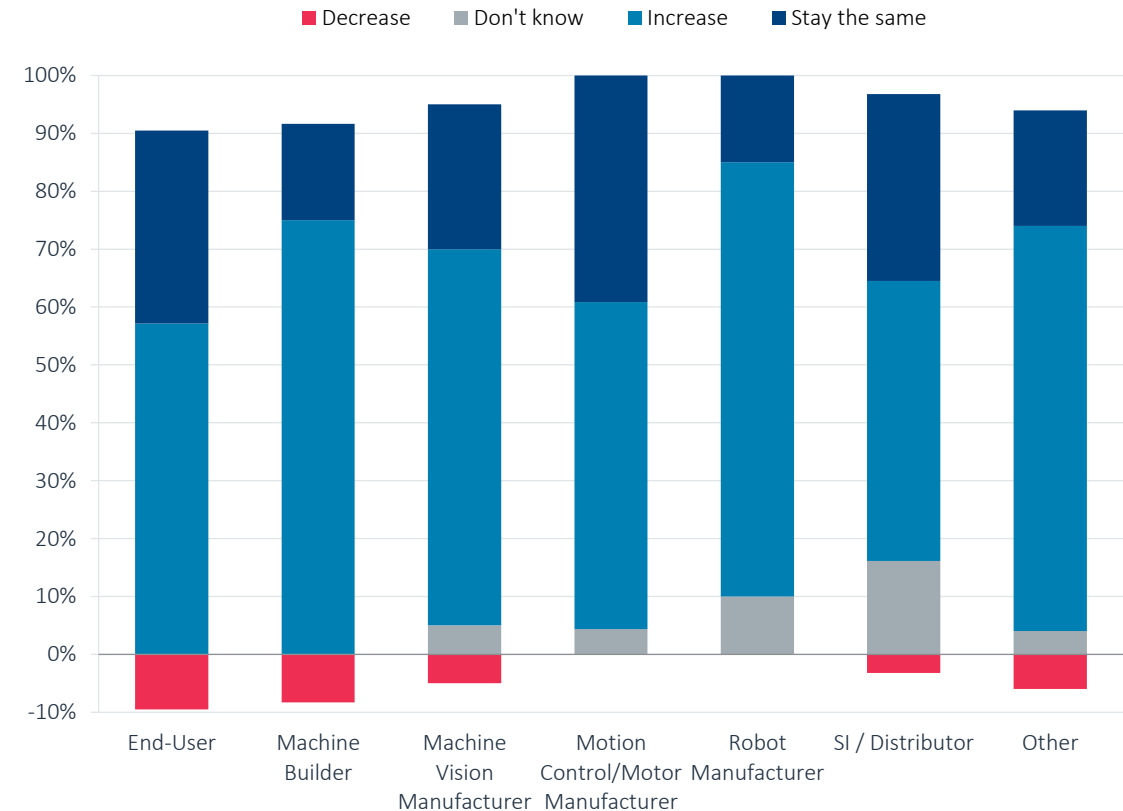
Compared to 2020 do you expect your organization's investment in capacity or infrastructure to increase, decrease or stay the same in 2021?



What do you expect to happen to your organization's investment in capacity or infrastructure?



What do you expect to happen to your organization's investment in capacity or infrastructure?



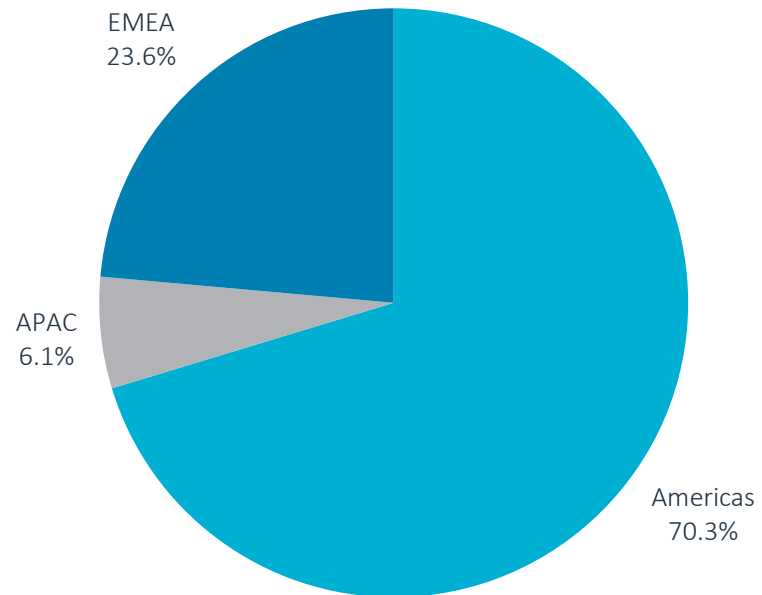
Demographic of Respondents



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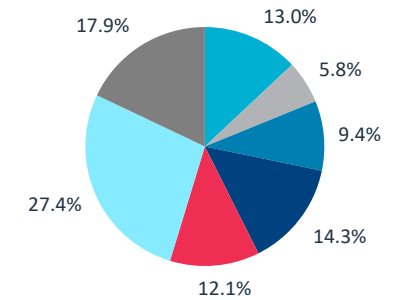
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Region of Origin

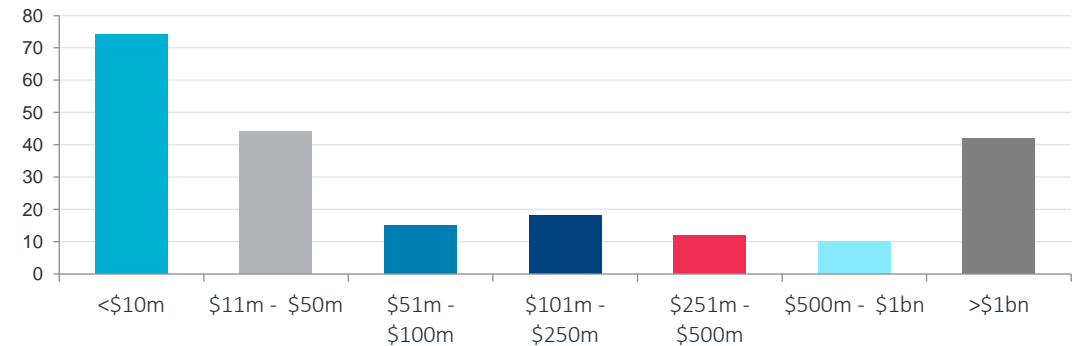


Company Type

- End-User
- Machine Builder
- Machine Vision Manufacturer
- Motion Control/Motor Manufacturer
- Robot Manufacturer
- System Integrator/Distributor
- Other



Approximate Revenue



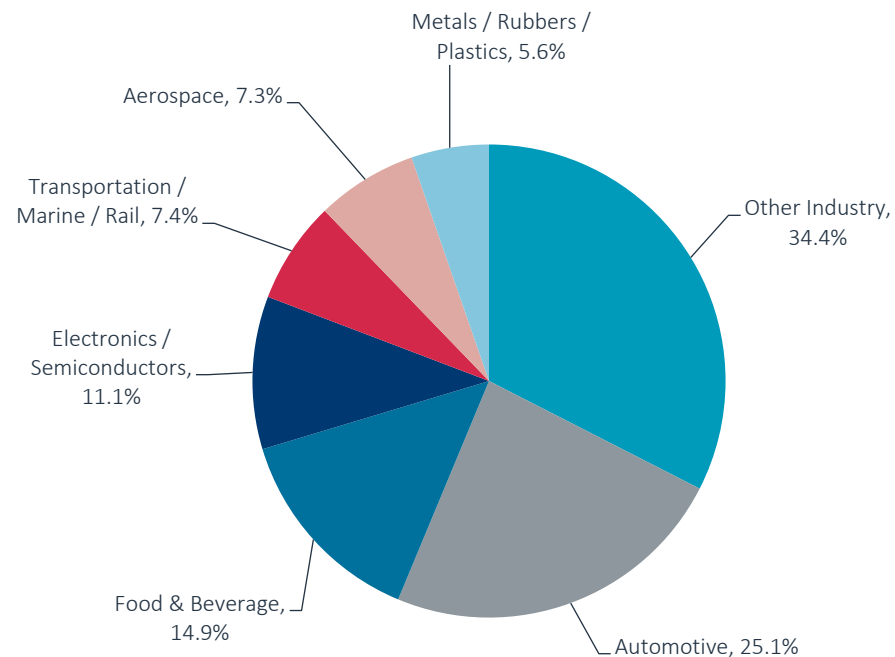
Demographic of Respondents Cont'd: Which are the 3 largest end industries for your company's products / services?



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Most Common Choices for Largest End Industry



Company Type	Most Common First Choice	Most Common Second Choice	Most Common Third Choice
End-User / Manufacturing Company	Automotive 28.6%	Metals / Rubbers / Plastics 31.25%	Electronics / Semiconductor 23.1%
Machine Builder	Other Industry 25.0%	Transportation / Marine / Rail 33.3%	Automotive 25%
Manufacturer of Machine Vision Products	Automotive 42.9%	Other Industry 19.1%	Electronics & Semiconductor 30.0%
Manufacturer of Motion Control & Motor Products	Automotive 34.5%	Other Industry 20.7%	Metals / Rubbers / Plastics 25.9%
Manufacturer of Robots	Other Industry 50.0%	Other Industry 33.3%	Food & Beverage 29.4%
System Integrator/Distributor	Automotive 37.5%	Other Industry 31.0%	Food & Beverage 24.0%
Other	Automotive 40.0%	Food & Beverage 16.3%	Other Industry 28.2%

Join A3 for More Automation Insights!



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- Interact Analysis has partnered with the Association for Advancing Automation (A3) and provides regular automation industry insights to A3 members.
- This survey was done for the Automate Forward virtual trade show and conference March 22-26, 2021, and the results are available to the public for free.
- More information and insights await you through membership in A3. Contact Alex Shikany, A3 Vice President of Membership & Business Intelligence (ashikany@a3automate.org) for more information, or visit www.automate.org to join the leading global automation association.



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