

# Global State of RPA in SMB: 2023 Report

**SMB**  
10-200 Employees

**Midmarket**  
200-1000 Employees

## Automation IT Services:

- Robotic Process Automation
- API Integration
- SaaS Workflow automation, including CRM/ Project management/ERP workflows, excludes greenfield implementation services
- SaaS Workflow Integration
- Custom Software Development
- Digital Documents Processing

## Average Annual Spending on Automation Services and Software by SMBs in 2022

Includes Software And Services

Region	2022	2023 Projected Growth
North America*	\$13,700	\$17,500 → 27.74%
APAC - India	\$4,300	\$4,800 → 11.63%
APAC - Australia	\$11,300	\$13,200 → 16.81%
Brazil	\$7,400	\$8,800 → 18.92%
Latin America**	\$6,700	\$8,900 → 32.84%
EMEA - Israel	\$9,800	\$11,200 → 14.29%
EMEA - South Africa	\$4,400	\$5,500 → 25.00%
EMEA - Germany	\$10,800	\$11,900 → 10.19%

\*Unites States, Canada    \*\*Mexico, Columbia, Argentina, Peru



## IT Services Insights

% of SMB companies that invested in Automation Services/ Software and implemented at least one RPA bot		% of SMB CEOs that invested in RPA services in 2022 and plan to increase their investments in 2023		% of SMB CEOs who plan to increase spending on Automation Services and/on Software		% of automation projects that involve RPA	
Region		Region		Region		Region	
North America*	25%	North America*	93%	North America*	87%	North America*	16%
APAC - India	14%	APAC - India	90%	APAC - India	64%	APAC - India	8%
APAC - Australia	20%	APAC - Australia	92%	APAC - Australia	82%	APAC - Australia	9%
Brazil	22%	Brazil	87%	Brazil	74%	Brazil	7%
Latin America**	13%	Latin America**	88%	Latin America**	80%	Latin America**	8%
EMEA - Israel	18%	EMEA - Israel	90%	EMEA - Israel	82%	EMEA - Israel	9%
EMEA - South Africa	8%	EMEA - South Africa	85%	EMEA - South Africa	75%	EMEA - South Africa	4%
EMEA - Germany	11%	EMEA - Germany	93%	EMEA - Germany	85%	EMEA - Germany	11%

## IT Service Providers that offer Automation IT Services

% CEOs that report higher average check size from RPA projects compared to average revenue from automation services

Region	
North America*	82%
APAC - India	83%
APAC - Australia	74%
Brazil	80%
Latin America**	72%
EMEA - Israel	92%
EMEA - South Africa	76%
EMEA - Germany	85%

% CEOs that report higher average billing rate from RPA projects compared to average revenue from automation services

Region	
North America*	85%
APAC - India	92%
APAC - Australia	84%
Brazil	89%
Latin America**	92%
EMEA - Israel	90%
EMEA - South Africa	78%
EMEA - Germany	87%

% CEOs that report higher RPA client retention compared to retention of clients for other automation services (clients who spent on RPA in 2021 and continued spending in 2022)

Region	
North America*	75%
APAC - India	65%
APAC - Australia	88%
Brazil	70%
Latin America**	74%
EMEA - Israel	71%
EMEA - South Africa	80%
EMEA - Germany	77%

% IT Services that offer Automation Services and generate more than 20% of revenue as recurring revenue from subscriptions/maintenance

Region	
North America*	35%
APAC - India	20%
APAC - Australia	24%
Brazil	35%
Latin America**	33%
EMEA - Israel	30%
EMEA - South Africa	29%
EMEA - Germany	27%

% CEOs that expect more than 10% of automation revenue growth in 2023 attributed to Automation services sold by subscriptions

Region	
North America*	85%
APAC - India	62%
APAC - Australia	75%
Brazil	52%
Latin America**	73%
EMEA - Israel	82%
EMEA - South Africa	73%
EMEA - Germany	69%

NOTE: Mid-market is not the focus of the research, but we found this data reported by Service providers valuable

## Estimated Percent of SMBs that are clients of IT Service Providers and invest in Automation Software or Services

Region	2022	2023	Growth
North America*	16%	28%	1.3x
APAC - India	8%	13%	1.4x
APAC - Australia	9%	21%	1.2x
Brazil	7%	19%	1.4x
Latin America**	8%	18%	1.5x
EMEA - Israel	9%	26%	1.2x
EMEA - South Africa	4%	11%	1.6x
EMEA - Germany	11%	28%	1.2x

## Average Annual Spending on Automation Services and Software by Mid-Market companies in 2022

Includes Software And Services

Region	2022	2023 Projected Growth
North America*	\$88,000	\$105,000 → 19.32%
APAC - India	\$42,000	\$64,000 → 52.38%
APAC - Australia	\$61,000	\$74,000 → 21.31%
Brazil	\$49,000	\$62,000 → 26.53%
Latin America**	\$38,000	\$55,000 → 44.74%
EMEA - Israel	\$58,000	\$76,000 → 31.03%
EMEA - South Africa	\$26,000	\$38,000 → 46.15%
EMEA - Germany	\$72,000	\$88,000 → 22.22%

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\*\*Mexico, Columbia, Argentina, Peru