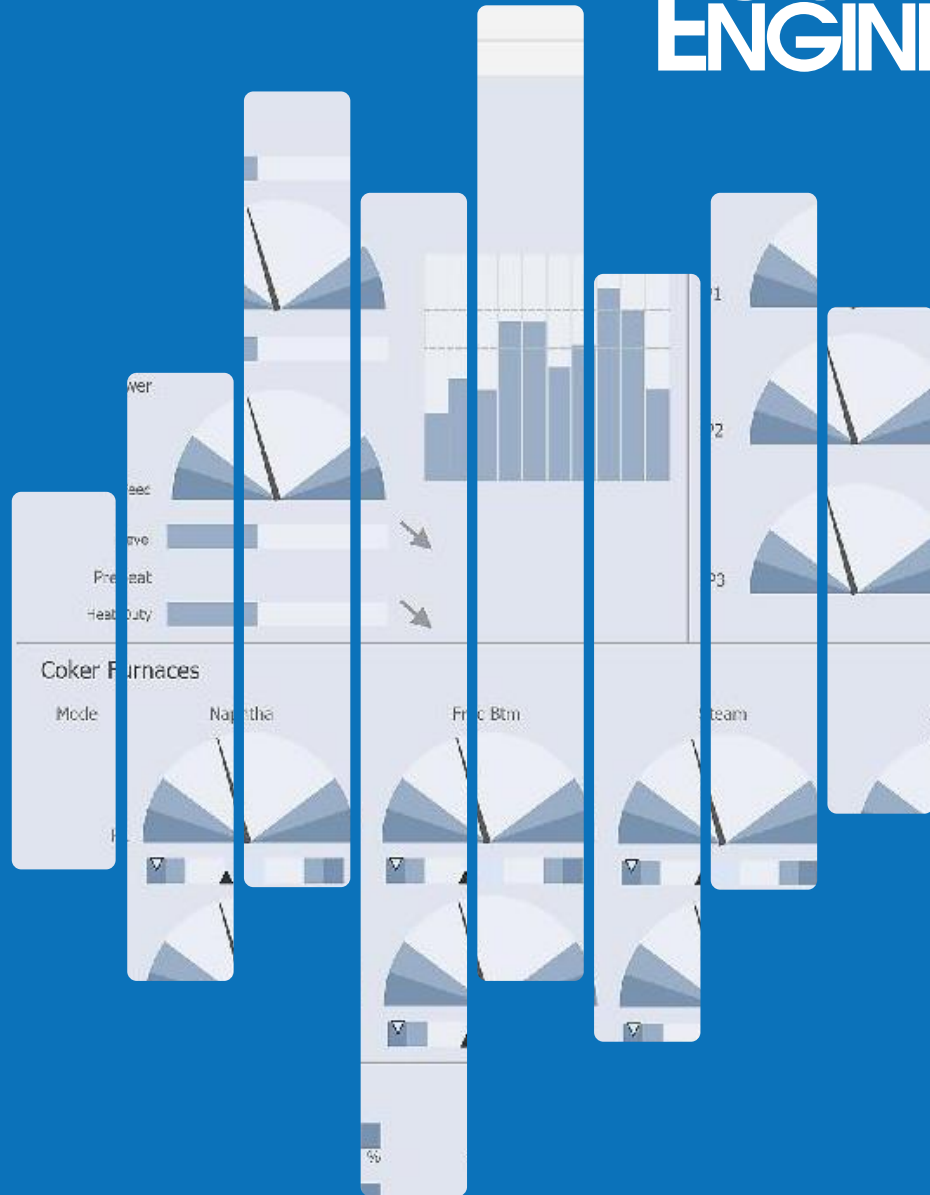


CONTROL ENGINEERING®



Purchasing Considerations for
**Automation Systems
& Control Systems**
May 2022

CFE Media
and Technology™

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Introduction

Objective

The following study was conducted by *Control Engineering* to obtain key insights from automation engineering professionals on purchasing automation systems and control systems across process, discrete and hybrid industries.

Sample

The sample for this study was selected from qualified subscribers of *Control Engineering* media with valid email addresses and who are involved in the purchase or specification of control systems, including HMIs, PLCs, PACs, DCSs, single-loop or PC-based controllers.

Methodology

Subscribers were sent an email from *Control Engineering* asking them to participate in this study. The email included a URL linked to the questionnaire.

- Data collected: March 3, 2022, through March 11, 2022
- Number of respondents: 158
- Margin of error: +/-7.8% at a 95% confidence level
- Incentive: Drawing for one \$100 Amazon.com eGift Card

Summary of Findings

Researching & Purchasing

- Survey respondents are involved in the purchase or specification of various products and systems, often selecting more than one category of product. Seventy-eight percent of respondents purchase or specify control systems; 58% process, discrete or vision systems; 48% motion control systems and robotics.
- Looking at last year's budget for automation systems and/or control systems, the average company allocated 28% to new systems, 25% for replacing equipment, 22% to upgrading systems, 18% for system integration and services and 7% to other functions.
- When researching and purchasing automation systems and/or control systems, respondents spend an average of 28% of their time researching vendors and products, 18% budgeting and return on investment (ROI) justification, 20% writing specifications or requests for quotes, 19% evaluating vendors and products and 11% making the purchase.
- Respondents spend an average of 5 months researching and evaluating a new products or system—one never previously bought—before purchasing; 25% require more than 6 months and 5% only purchase products with which they are familiar.
- Sixty-five percent of respondents work within a team or committee when purchasing automation systems and/or control systems. The average team consists of five people.

Vendor Considerations

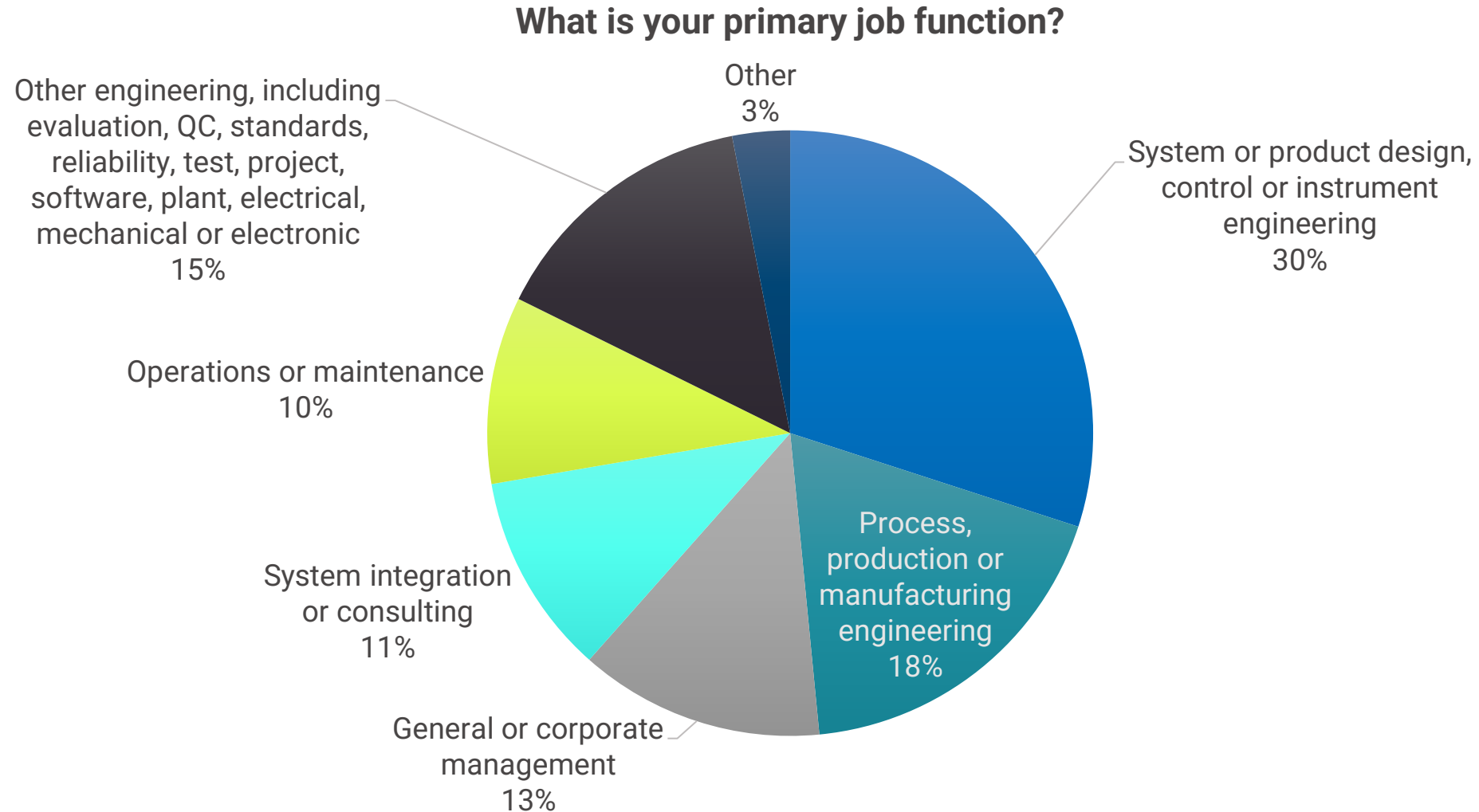
- Forty-six percent of respondents' organizations purchase the majority of automation systems or control systems directly from a vendor; 26% from a local distributor; 13% from a national distributor; 11% through a third-party contractor; 4% other.
- Automation system and control system vendors are able to better retain their customers if they offer access to knowledgeable engineers—not just the sales department (76%), demonstrate competence and dependability (66%), provide honest answers and information (57%) and good local support (57%).
- The majority of respondents' organizations (88%) are willing to look at other supplier options when considering future automation system or control system purchases; 12% are very satisfied with their current supplier and would not be interested in switching at this time.
- Providing cost comparisons, both upfront and long-term, and being able to focus on helping customers with specific requests are key details that a new automation system or control system vendor can offer to distinguish itself and potentially win new business.
- After purchasing or helping recommend automation systems or control systems, implementation is often performed by the end user team (37%), system integrators (31%) or the manufacturer (13%). Subsequently, the end user team is most often responsible for maintaining and upgrading the systems (61%).
- Half of respondents (51%) expect to see an increase in factory automation projects in the next 12 months. Other products or systems that are anticipated to surge are control design (42%), control panels (41%) and human-machine interface (40%).



Purchasing Considerations for Automation Systems & Control Systems

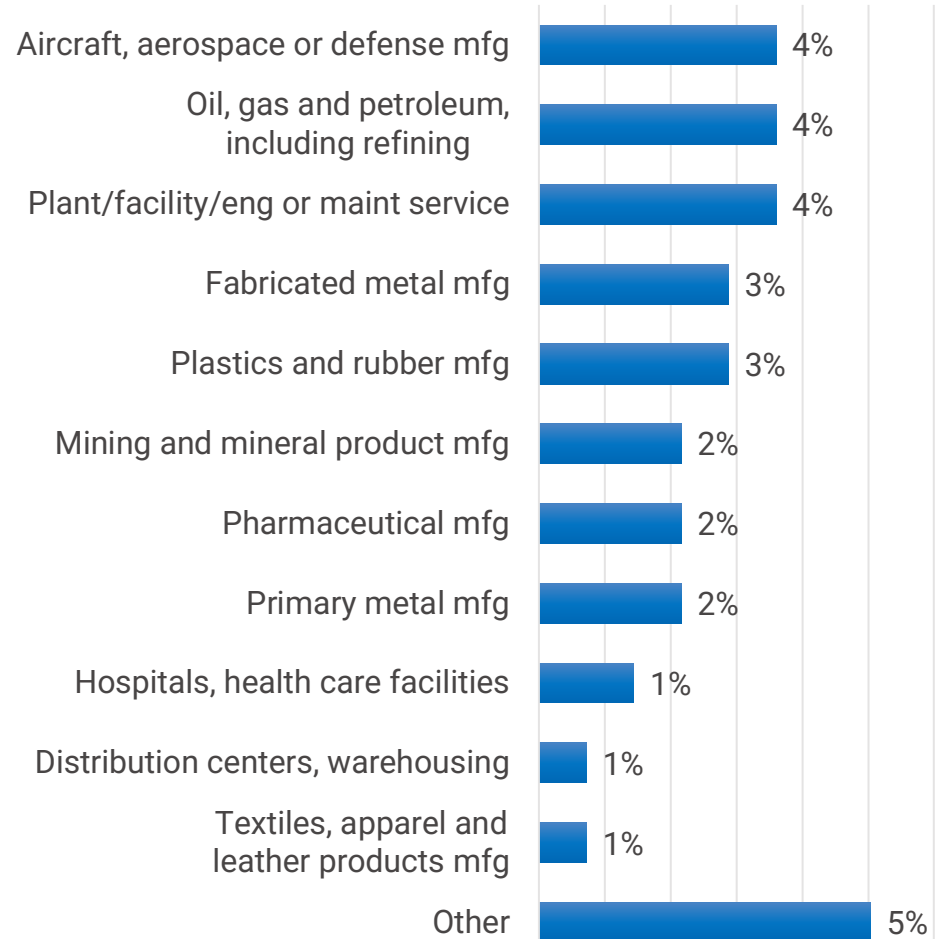
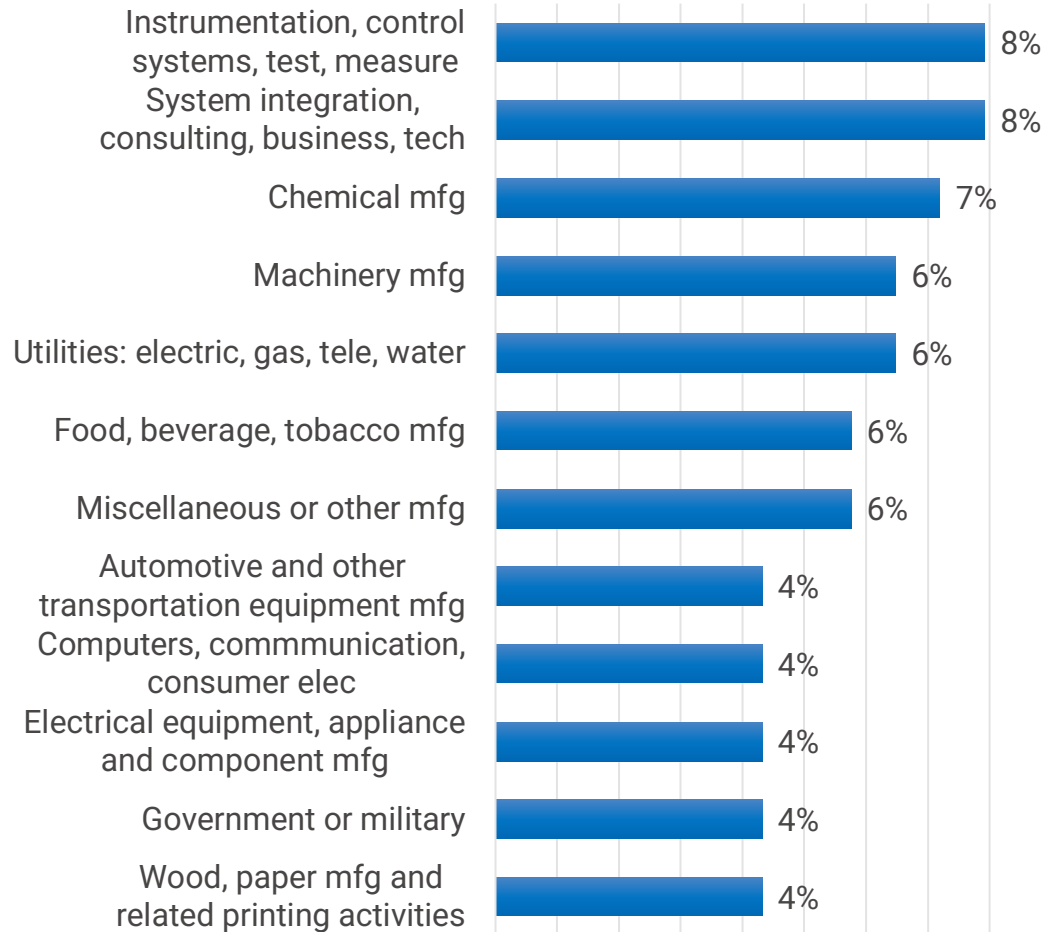
Respondent Background

Primary Job function

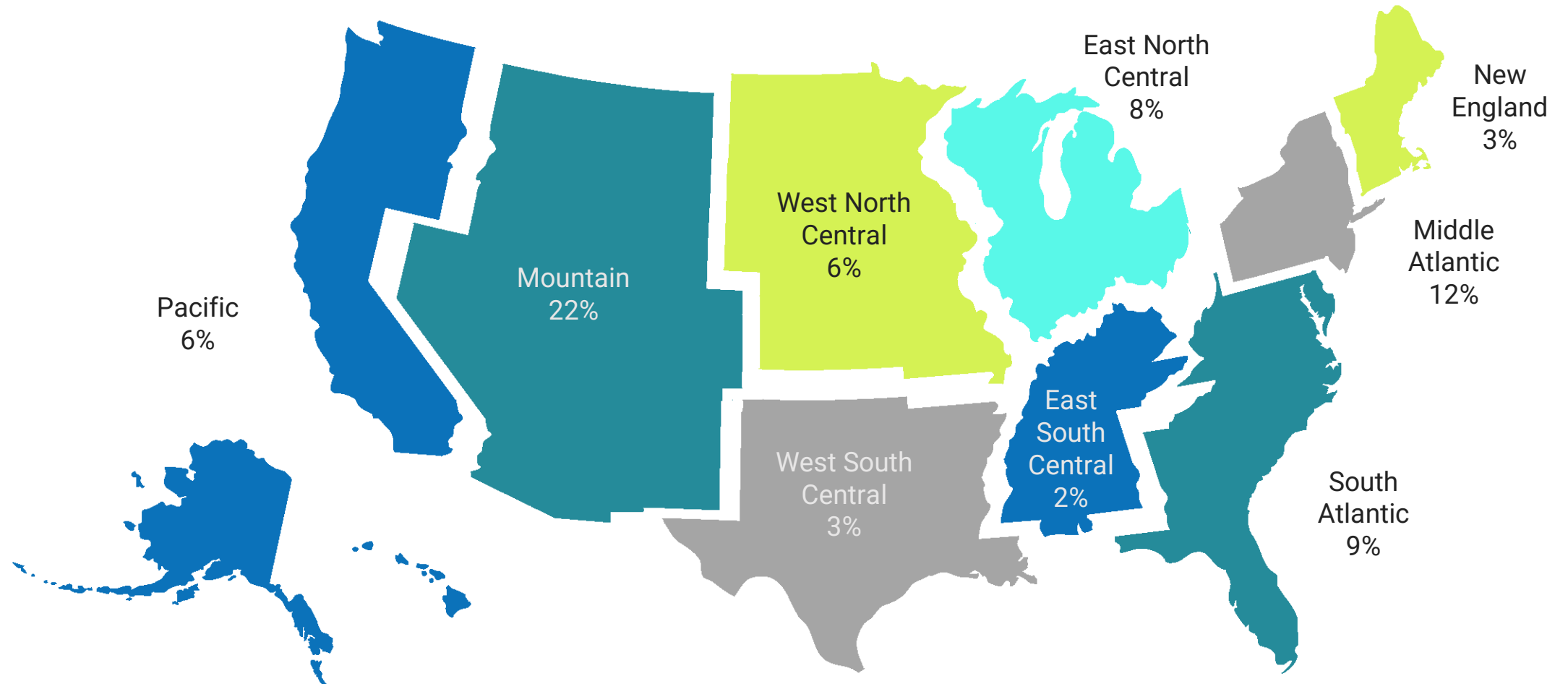


Primary Business

What is the primary business at your location?

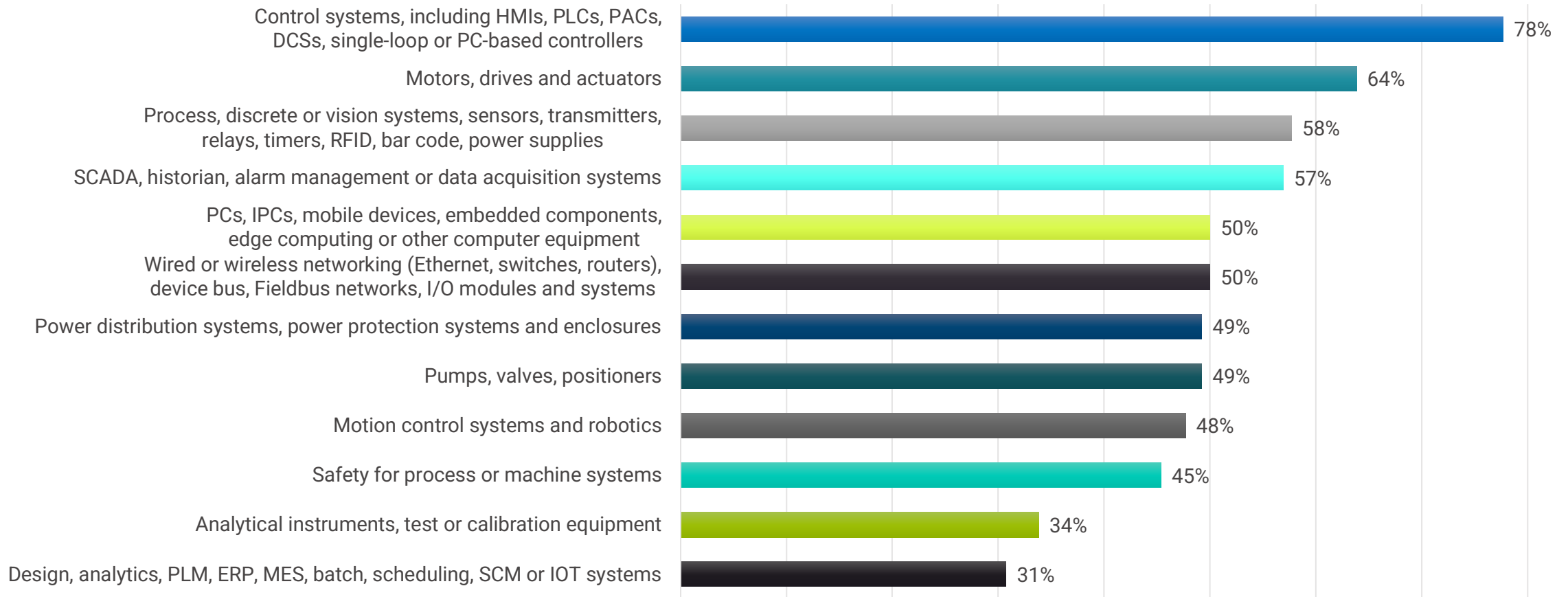


U.S. Location



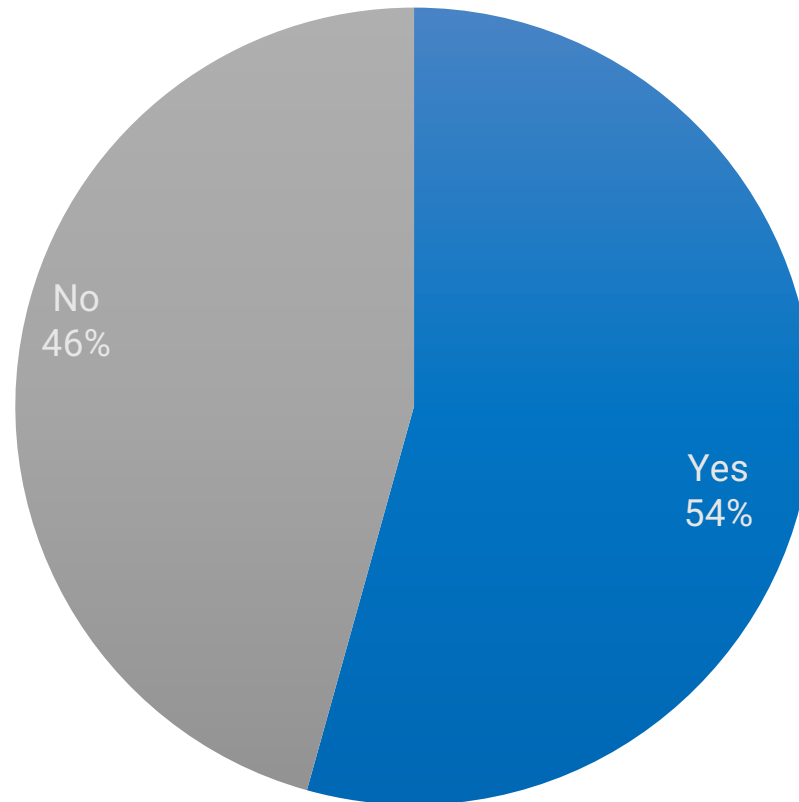
Products or Systems Purchased or Specified

Which of the following products or systems are you involved in the purchase or specification of? Check all that apply.



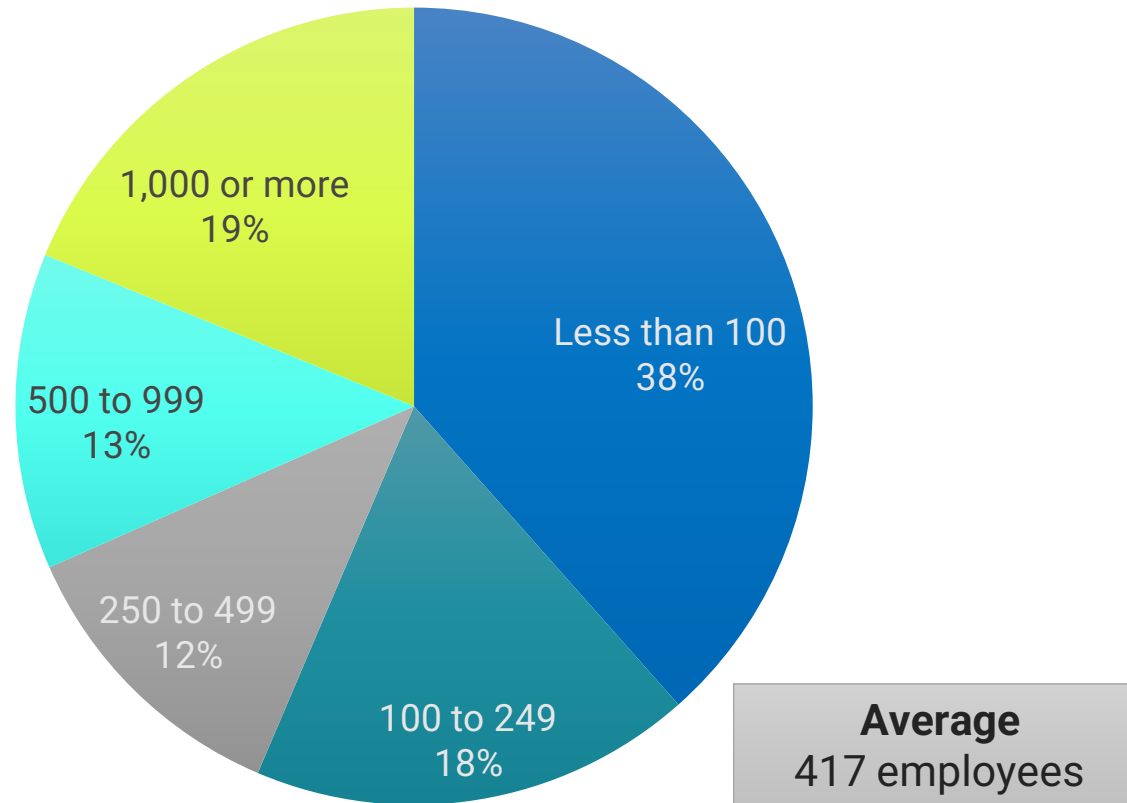
System Integration or Engineering Services

Do you provide system integration or engineering services to manufacturing organizations?



Company Size

How many people work at your location?



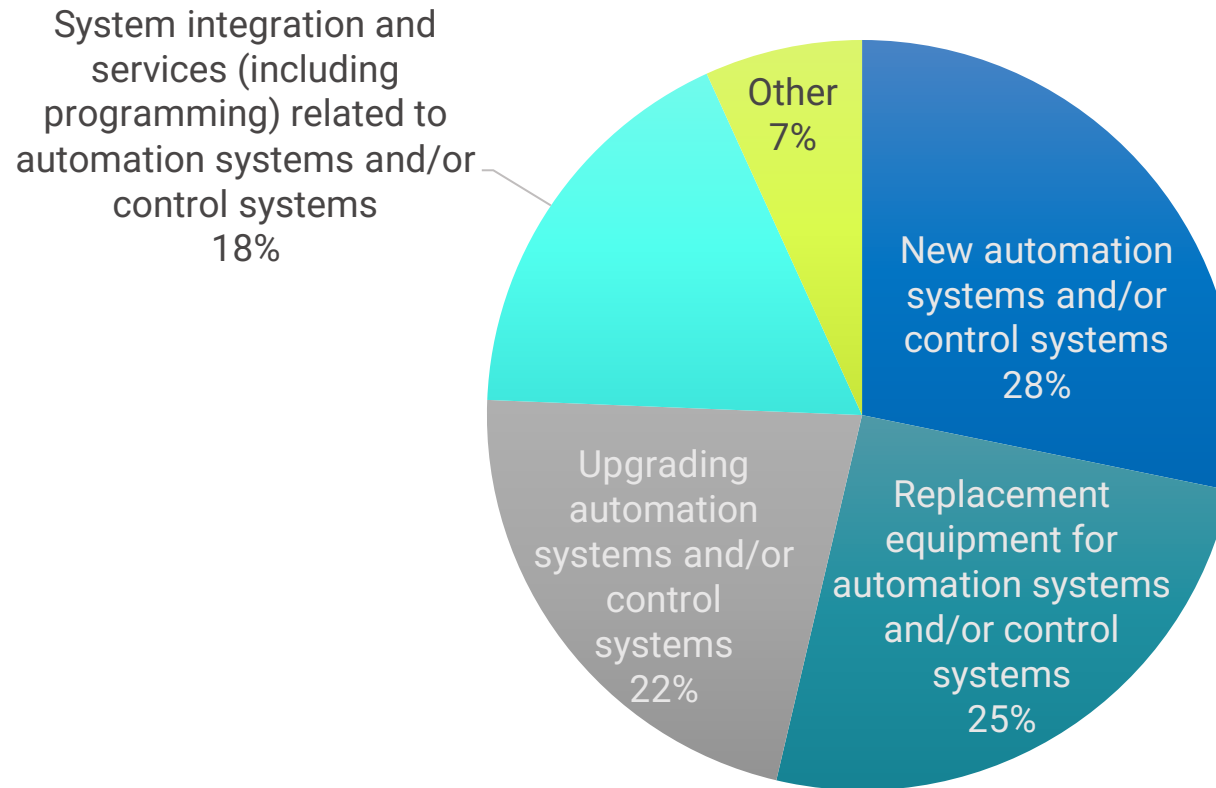


Purchasing Considerations for Automation Systems & Control Systems

Researching & Purchasing Automation Systems & Control Systems

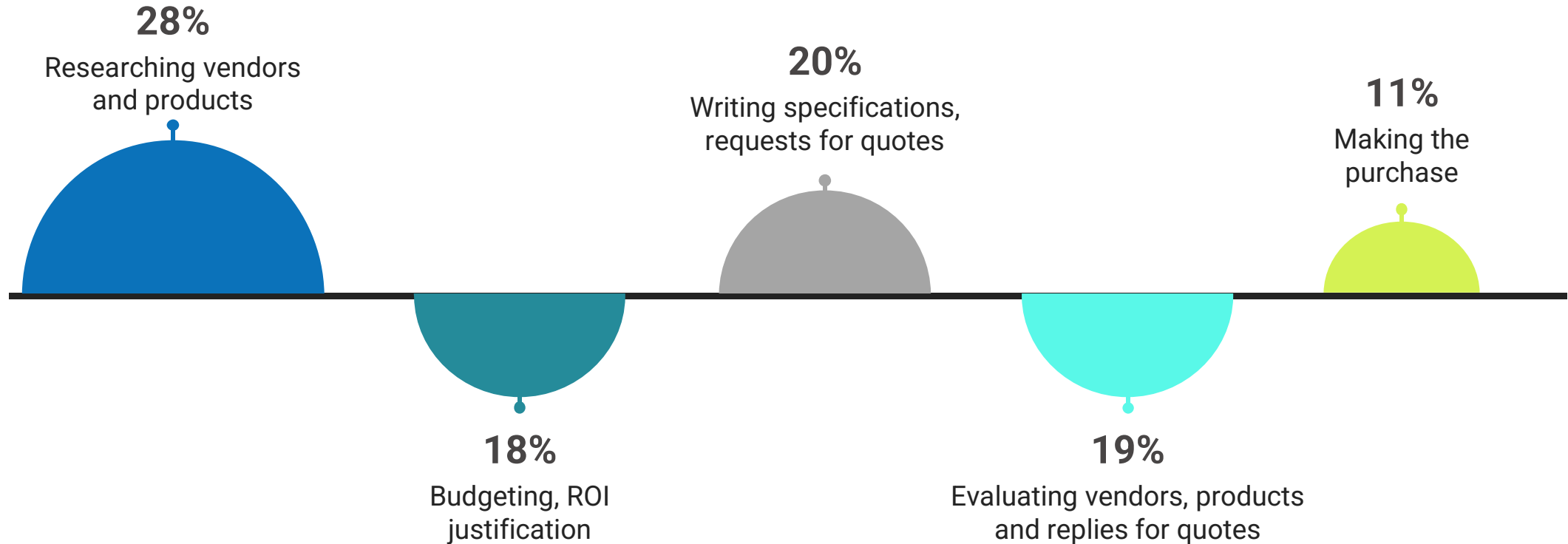
Average Automation System, Control System Budget Breakdown

Define the percentage of last year's automation system or control system budget that was spent in each of the areas shown.



Time Spent Researching & Purchasing Systems

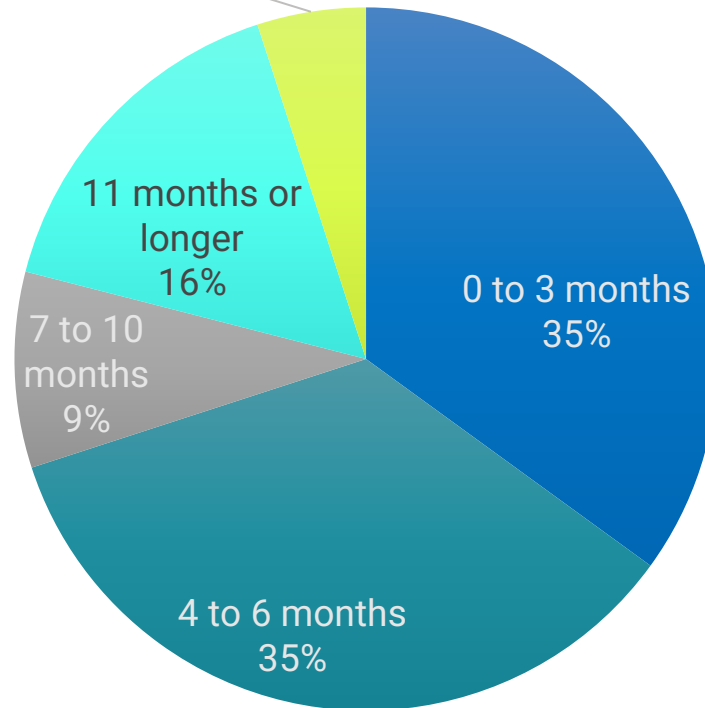
How is your time broken up when researching and purchasing automation systems or control systems?



Length of Research & Evaluation Process for New Products

When purchasing automation systems or control systems, how long is the research and evaluation process typically before you buy a new (never previously bought) product or system?

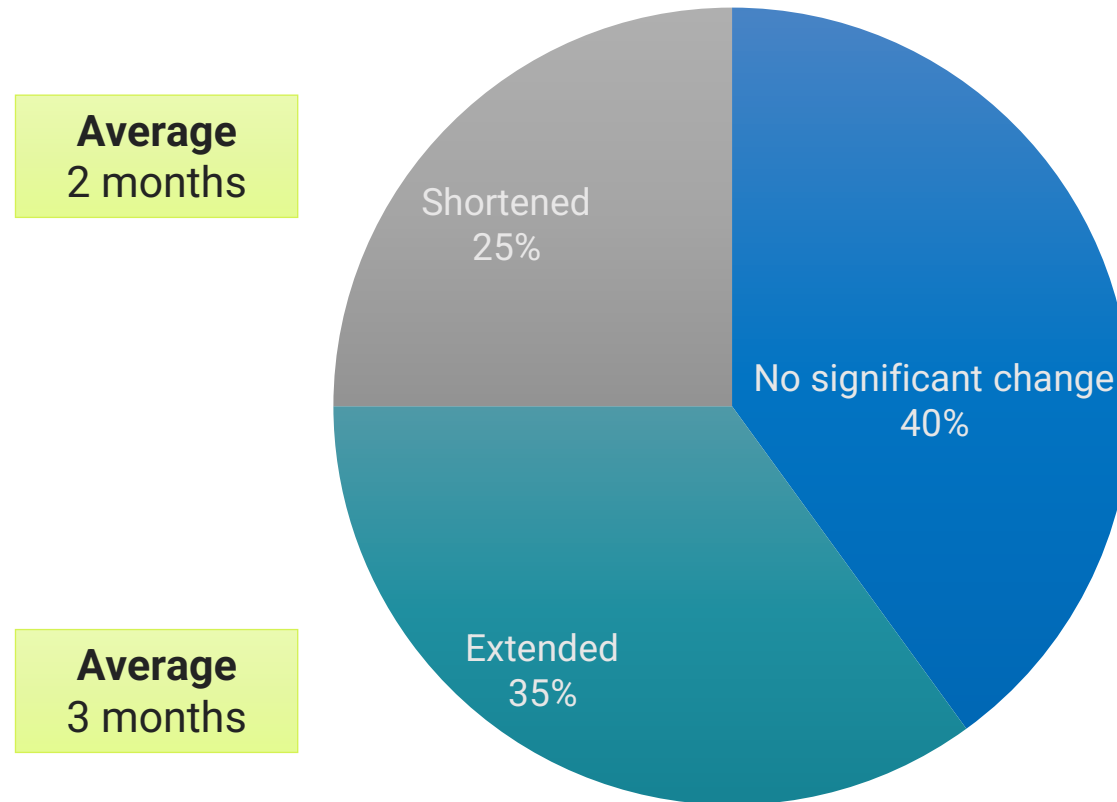
Not applicable (I only buy products I'm familiar with)
5%



Average
5 months

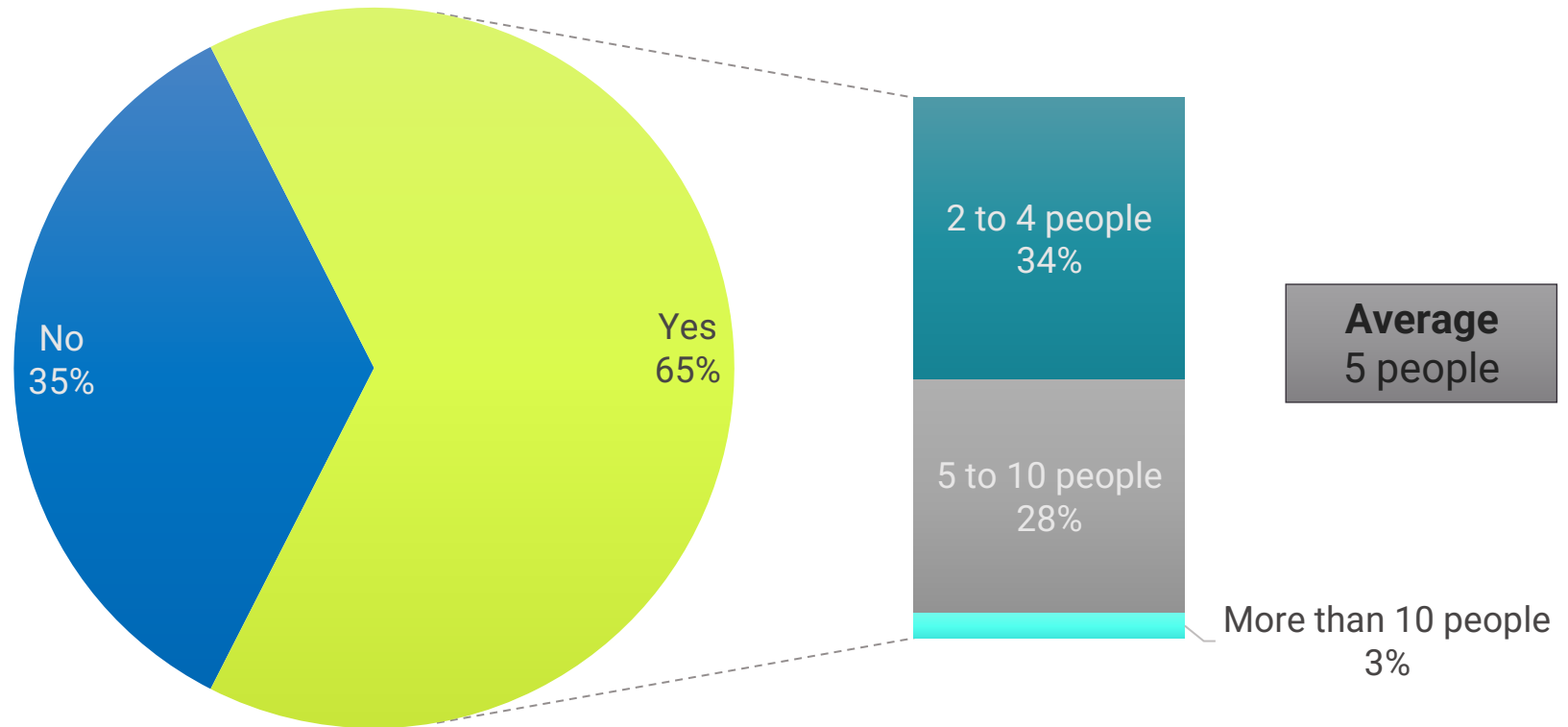
Recent Changes to Research & Evaluation Process

How has the research and purchasing process changed in the past 18 months?



Committee Involvement for Purchases

Do you work within a team or committee when purchasing automation systems and/or control systems? If yes, how many people are on the committee involved in the purchasing process?



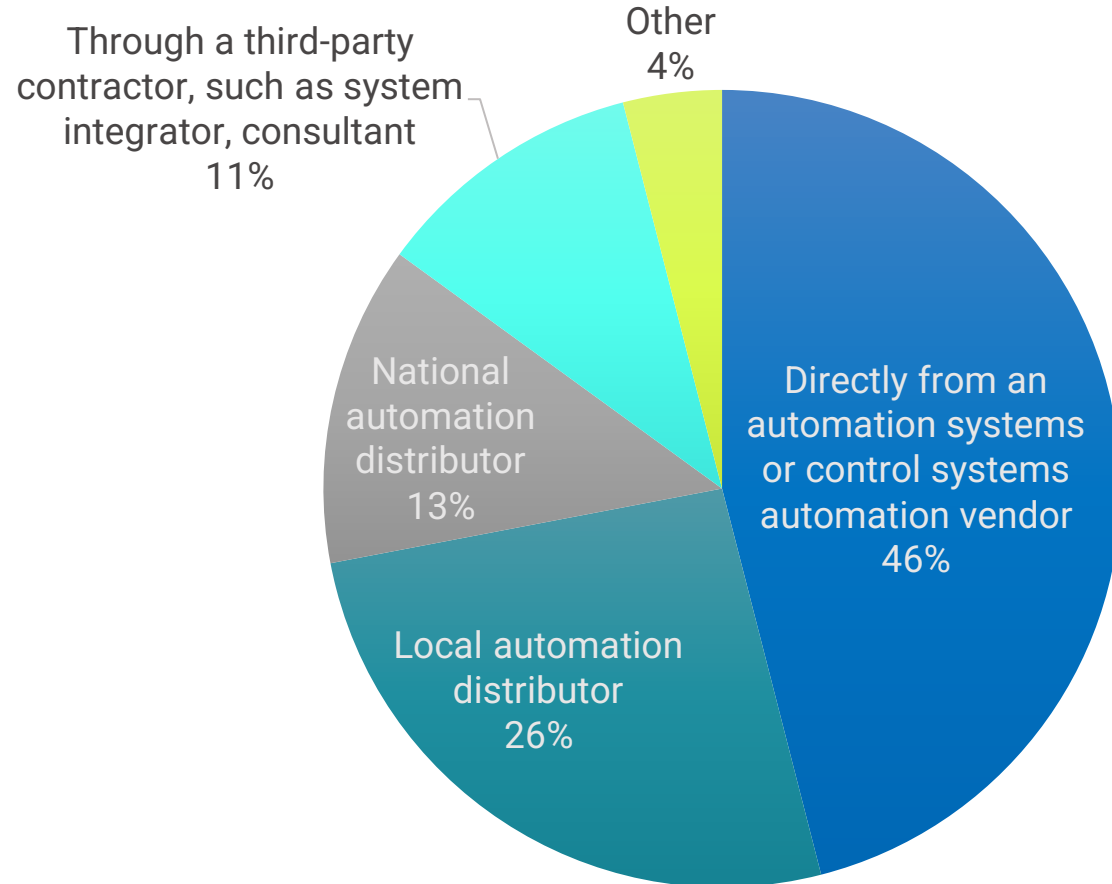


Purchasing Considerations for Automation Systems & Control Systems

Vendor Considerations

Sourcing Automation Systems, Control Systems

Where does your organization purchase most automation systems or control systems?



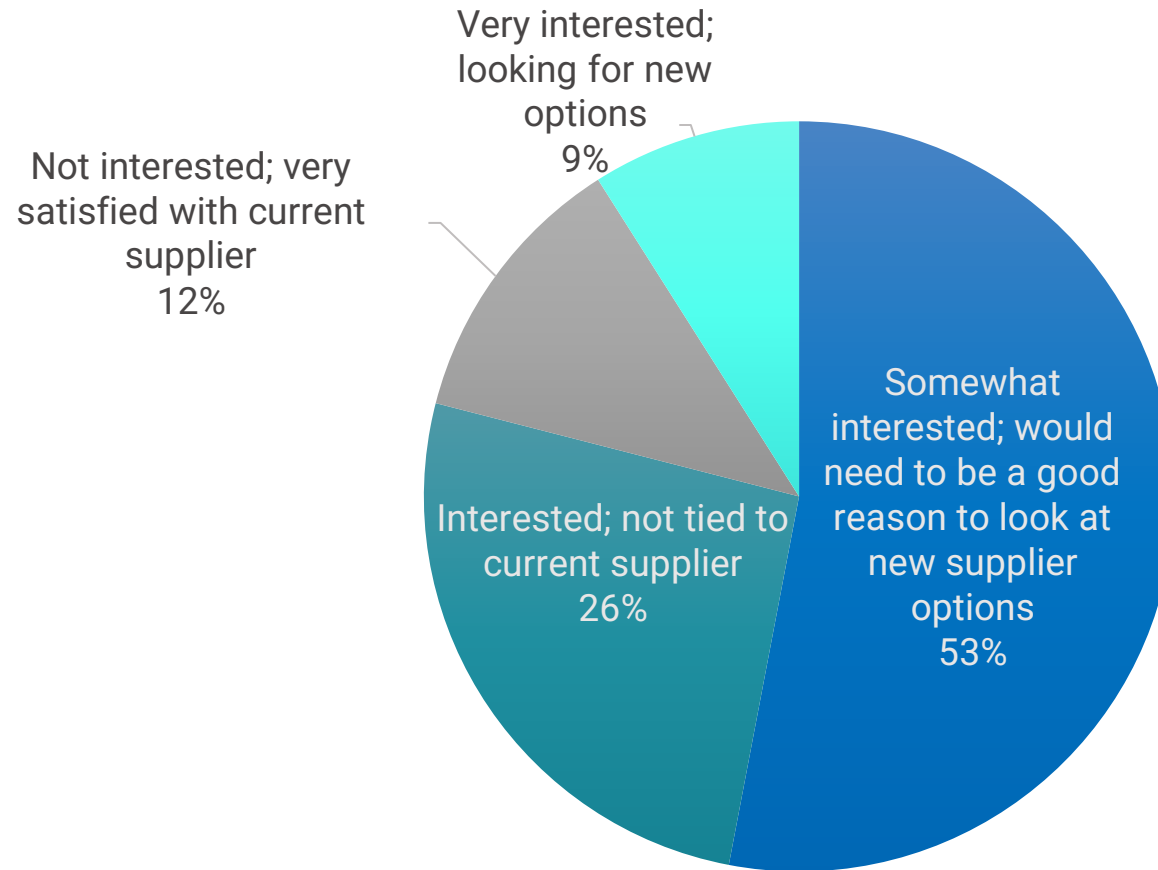
Top 10 Ways a Vendor Can Retain Customers

In your opinion, what does a vendor of automation systems and/or control systems need to do to retain your business? Check all that apply.



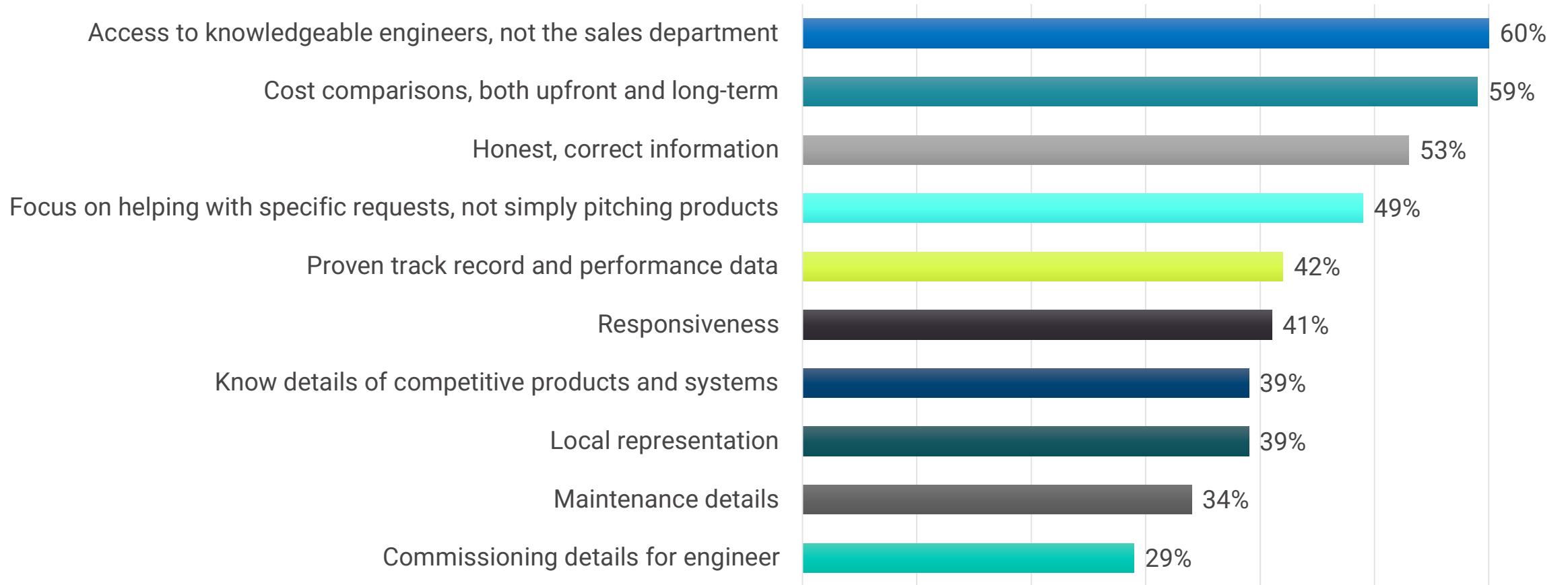
Willingness to Consider Other Purchasing Options

How willing is your organization to look at other purchasing options when purchasing other automation systems or control systems in the future?



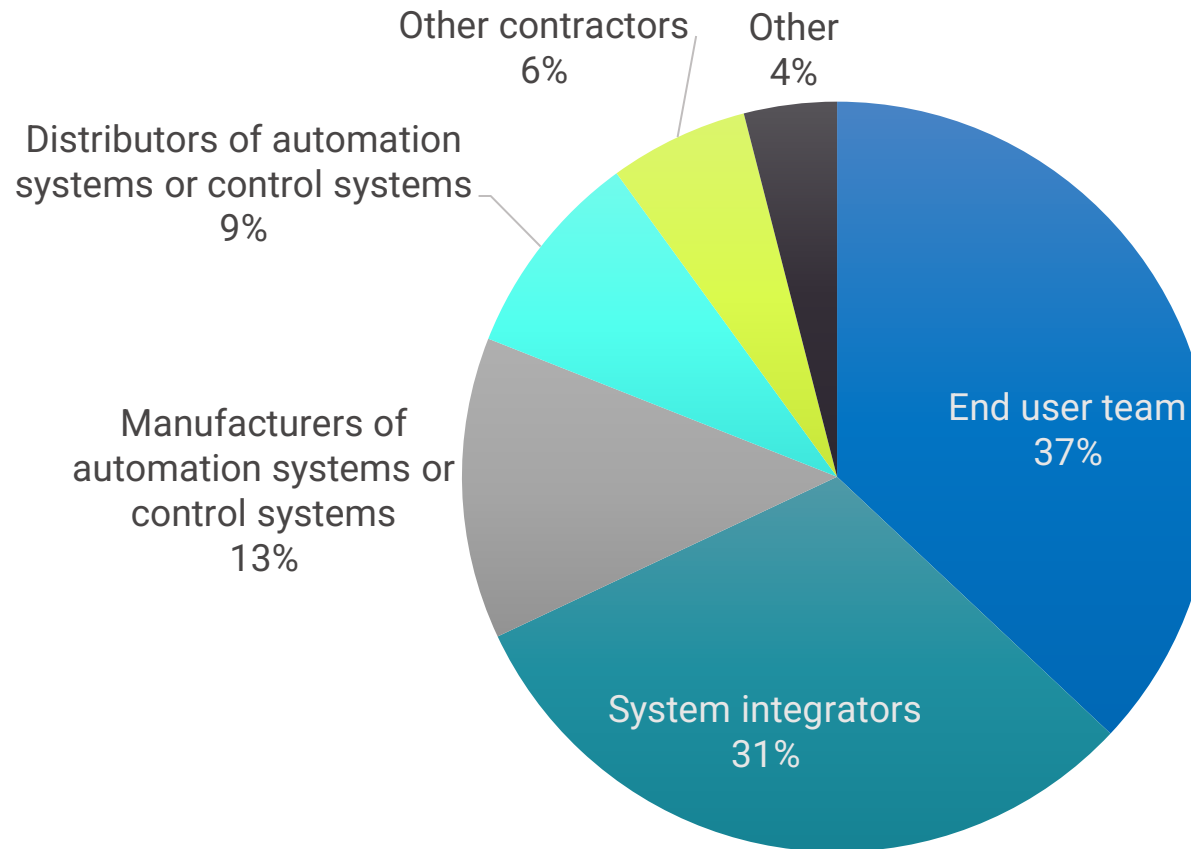
Top 10 Ways a Vendor Can Win New Business

How can a new vendor (i.e., one you have not yet worked with) distinguish itself and potentially win your business? Check all that apply.



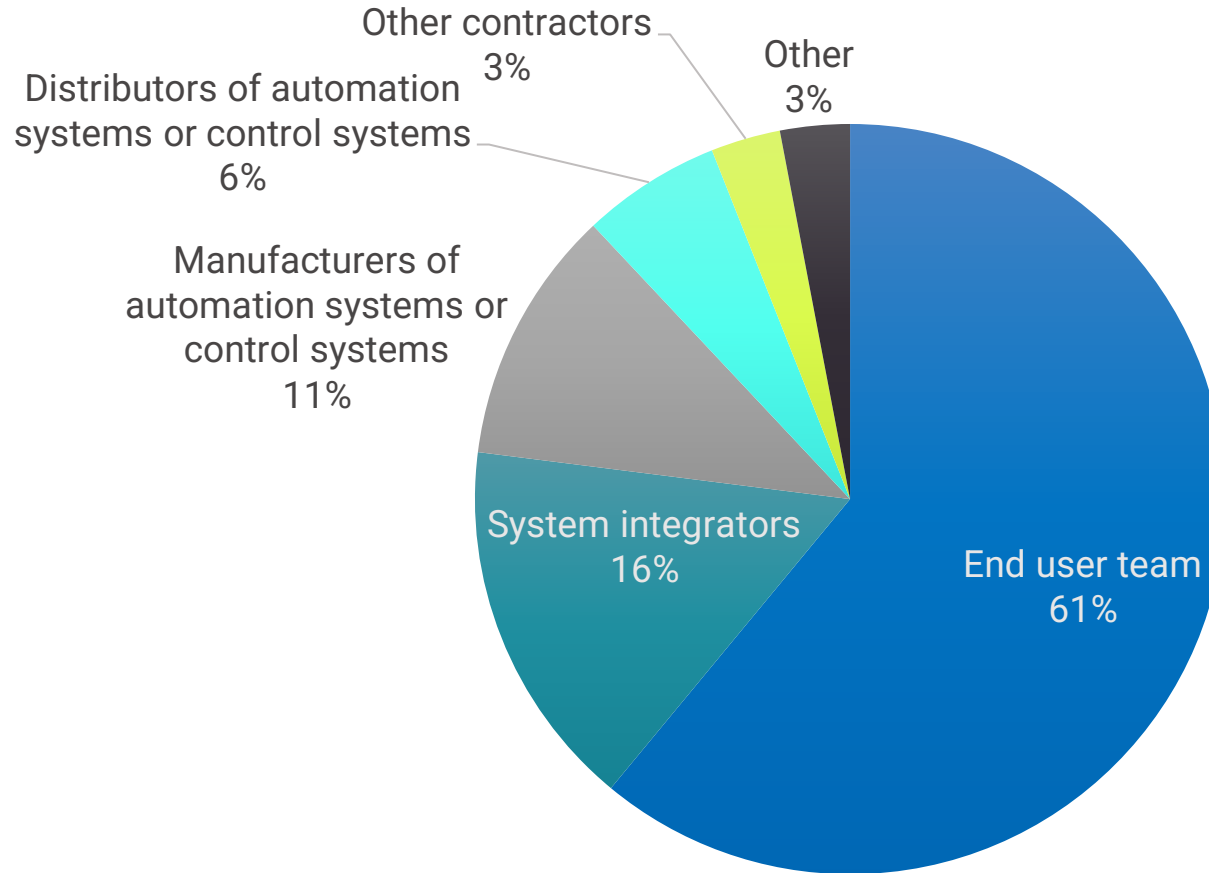
Implementing Automation Systems & Control Systems

After purchasing or helping recommend automation systems or control systems, how are they most often implemented?



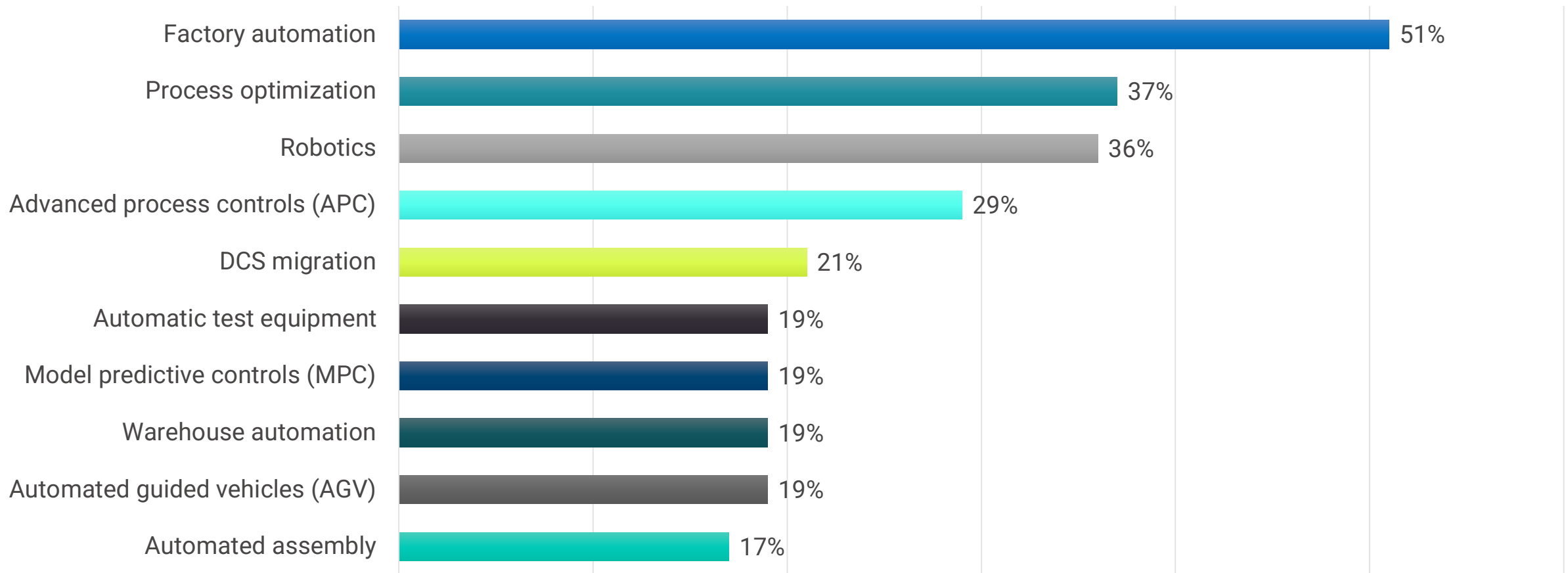
Maintaining Automation Systems & Control Systems

**After automation systems or control systems are implemented,
how are they maintained and upgraded?**



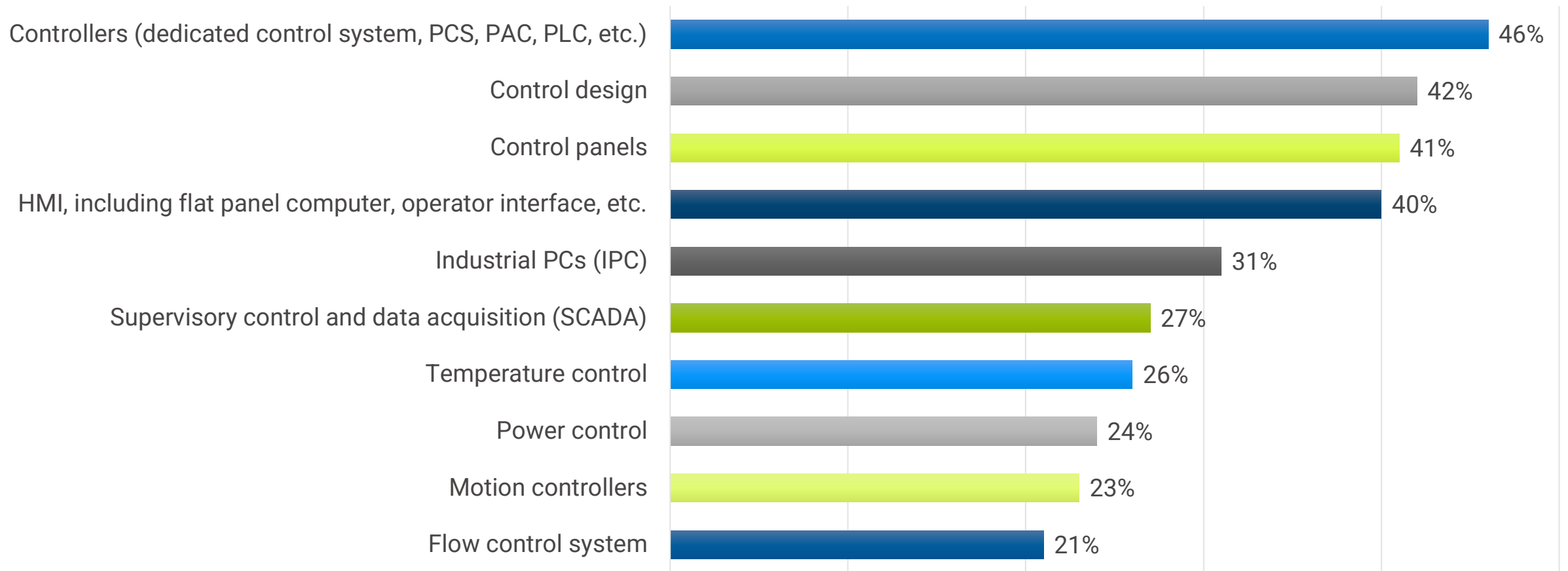
Top 10 Automated Process Technologies in Demand

For which technologies and services do you expect to see an increase in projects in the next 12 months? Check all that apply.



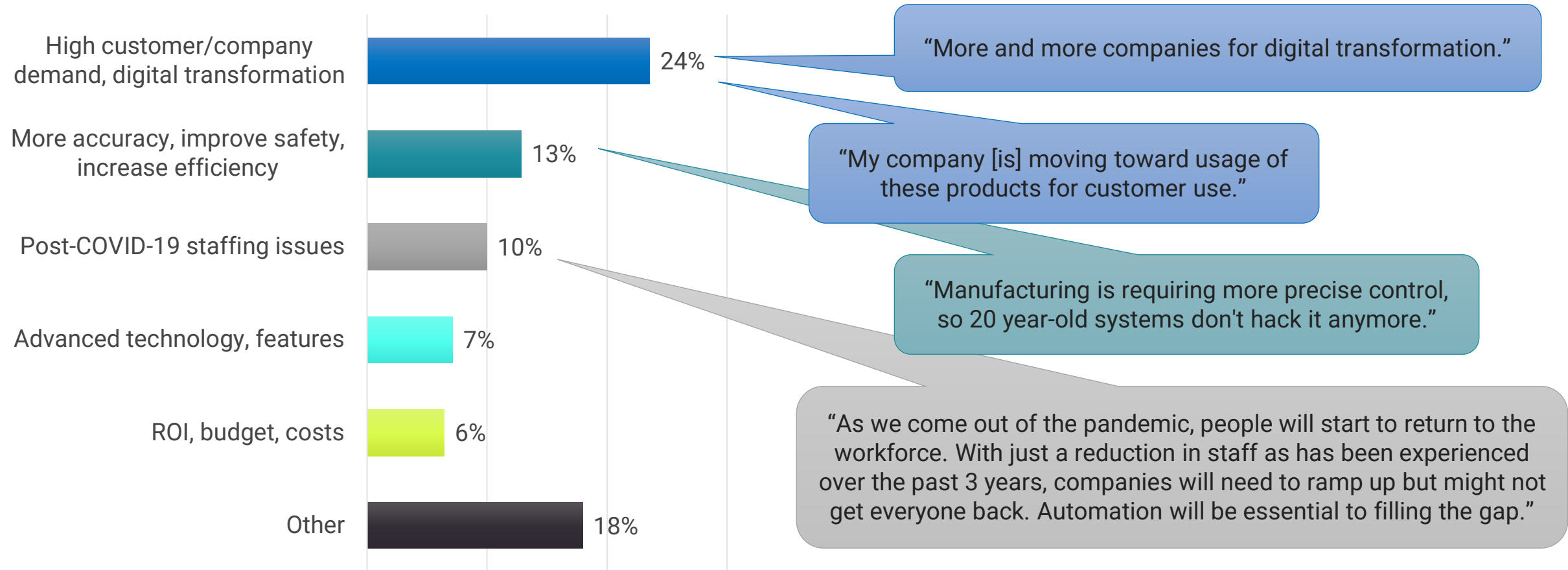
Top 10 Control System Technologies in Demand

For which technologies and services do you expect to see an increase in projects in the next 12 months? Check all that apply.



Automation System & Control System Technologies in Demand

For the technologies and services you selected in the previous question, why do you expect to see an increase of these in projects?*



*Question was asked as an open-text field—data is displayed as a multiple-select.