

INDUSTRY SNAPSHOT: TRANSPORTATION & LOGISTICS



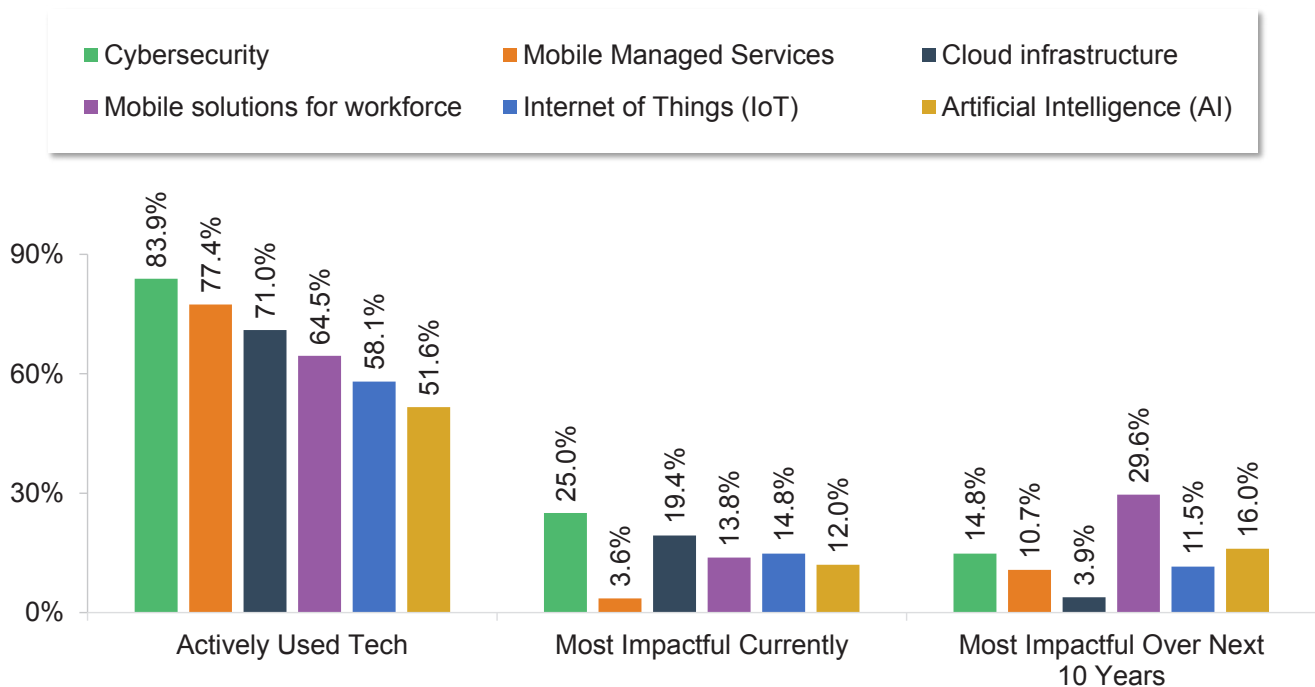
The presence of Innovators among transportation & logistics (T&L) organizations is very high at **45.2%**, far exceeding the overall average of **37.7%**. Additionally, respondents in this segment:

- > Have an average rate of feeling at a high risk of tech-led disruption (**19.4%** compared to **20.9%** overall)
- > Are by far the most agile in adapting to change; **38.7%** are extremely agile compared to **23.1%** overall

T&L organizations respond uniquely to barriers of change – they are the only group to name a lack of a culture of innovation as their primary roadblock. Missing out on a strong internal capacity for innovation is the most likely reason they include partnering with tech innovators and startups in their strategies for achieving disruption (**38.7%** vs **29.1%** overall).

As shown in the chart below, the suite of solutions deployed by T&L operations does not stand out from other industries. However, the shifting importance placed on given technologies and services does - the perceived impact through 2030 of mobile solutions for frontline workers jumps to **29.6%**, more than doubling, and MMS jumps from **3.6%** to **10.7%**.

T&L DEPLOYMENTS AND TECH IMPACT PERCEPTIONS OVER TIME



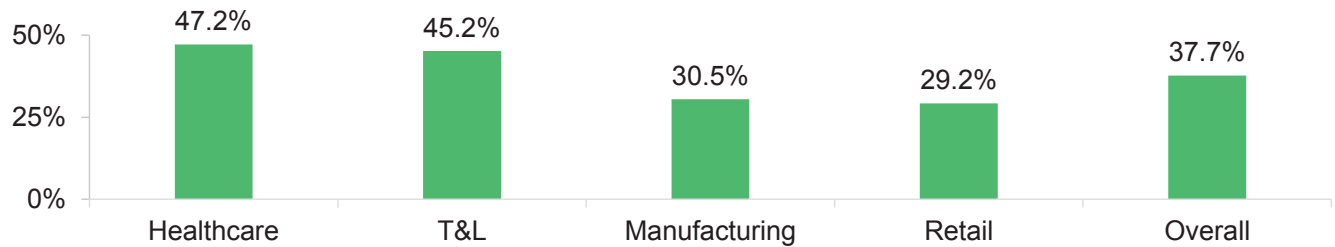
The strong presence of Innovators among T&L operations and the extreme agility in adapting to change that they possess is directly correlated to the healthy technology partner ecosystem that they participate in. Similarly, this segment's use of and forward-looking prioritization of MMS and frontline workforce mobility solutions are telling. We find that these are advantageous characteristics of Innovators across segments, and T&L operations accordingly seem best prepared for tech-led disruption – although they would do well to fortify their internal IT infrastructures so as to not have complete dependence on external players.

TRANSPORTATION & LOGISTICS AT A GLANCE

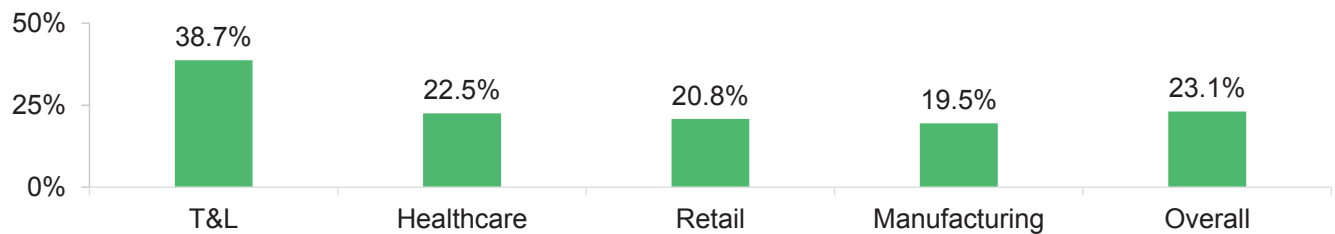
T&L'S MOBILE MATURITY

47.2% to 37.7%: The rate of Innovators in transportation & logistics compared to the overall average.

RATE OF INNOVATORS BY INDUSTRY



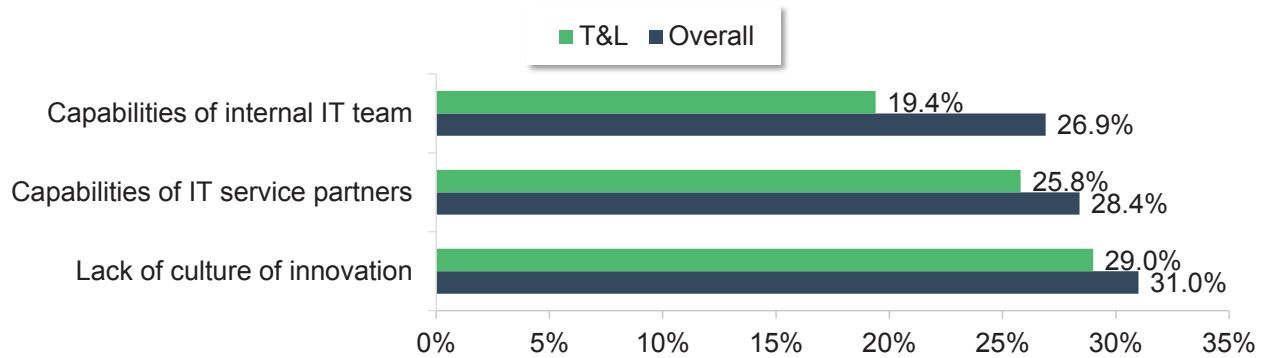
The T&L sector is also reports the highest adaptability to change. 38.7% claim they are extremely agile and market leaders in this regard, which is much higher than any other industry.



T&L'S ROADBLOCKS AND SOLUTIONS

At 29.0%, a lack of the culture of innovation is T&L's primary barrier to responding to change more quickly. The capabilities of their IT service partners is their second most problematic obstacle (25.8%). Both are unique to this sector as top two barriers to change, making them especially dependent on external help.

TOP 3 BARRIERS TO CHANGE



At 38.7%, transportation & logistics organizations are much more likely to partner with tech innovators and startups as a means to achieving disruption compared to the overall average (29.1%).

LOOKING AHEAD

Mobile solutions for frontline workforces to play an important role: A look at technologies that T&L organizations believe to be the most impactful today compared to the ones they think will be the most impactful over the next 10 years, the frontline mobile solutions has a significant jump from 13.8% to 29.6%. It is the single most important tech for T&L over the next 10 years, the only industry for which this is true.