

TPM²⁴

by S&P Global

TPMTech: Taking Stock of Supply Chain Investment Priorities

Mark Fontecchio
Transportation Research Analyst, 451 Research

Eric Johnson
Senior Editor, Logistics Technology

March 5, 2024

Supply Chain Digital Transformation Enterprise Survey 2024

S&P Global Market Intelligence's Supply Chain Digital Transformation Enterprise Survey 2024 provides you with actionable data to understand how digital transformation is affecting global enterprise supply chains, including insights into spending, deployment, staffing and technology decisions.

S&P Global Market Intelligence surveyed a group of supply chain professionals to discuss their digital transformation use cases and business outcomes. This survey was fielded November 20 through December 13, 2023.

Supply Chain Digital Transformation Enterprise Survey 2024

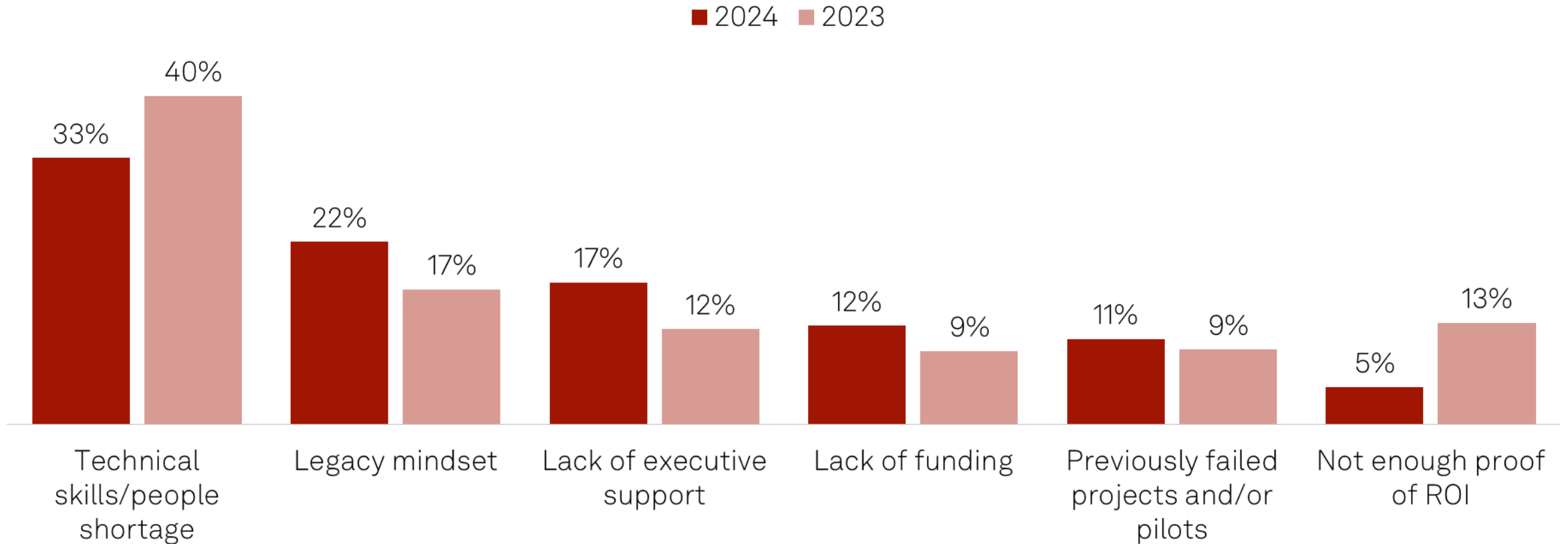


506 web-based surveys conducted with a base of supply chain decision-makers in North America, Europe and Asia.



Data-driven deliverables for fast access and ability to perform segmentation work.

Biggest hurdle to digital transformation

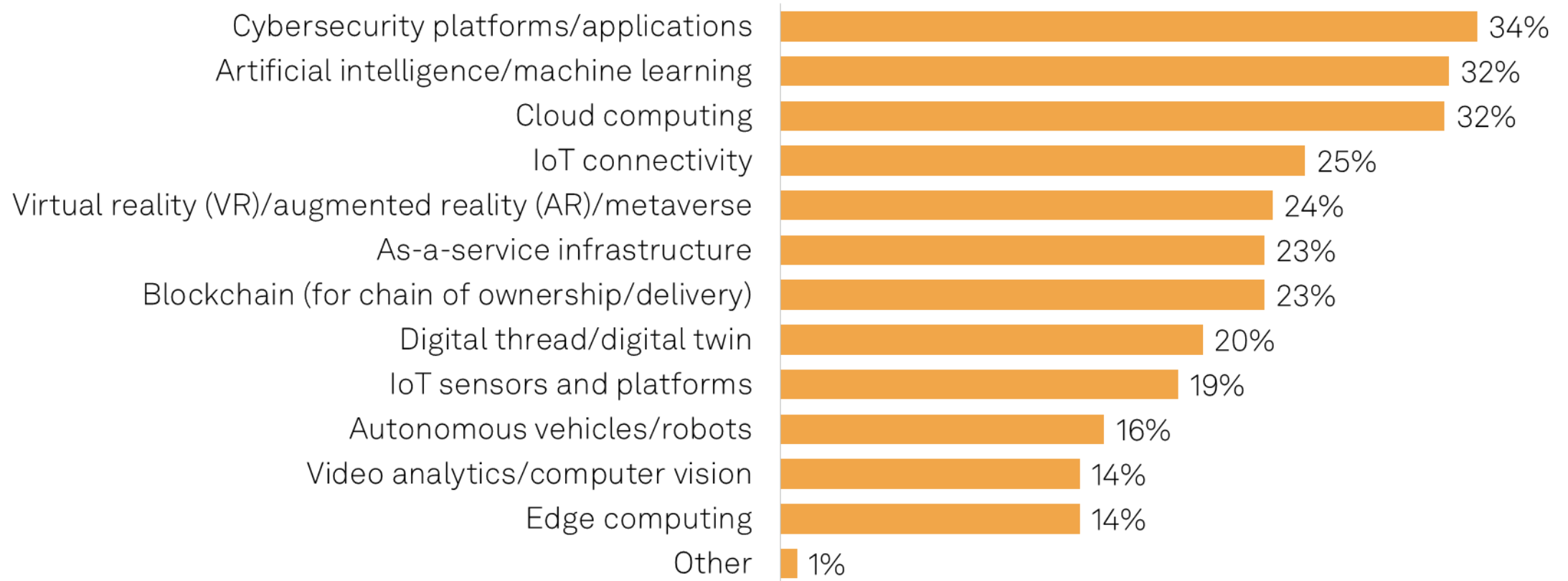


Q. What is the single biggest hurdle to digital transformation in your organization?

Base: All respondents (n=504).

Source: 451 Research Supply Chain Digital Transformation Survey 2024.

Technologies considered most impactful in supporting digital transformation

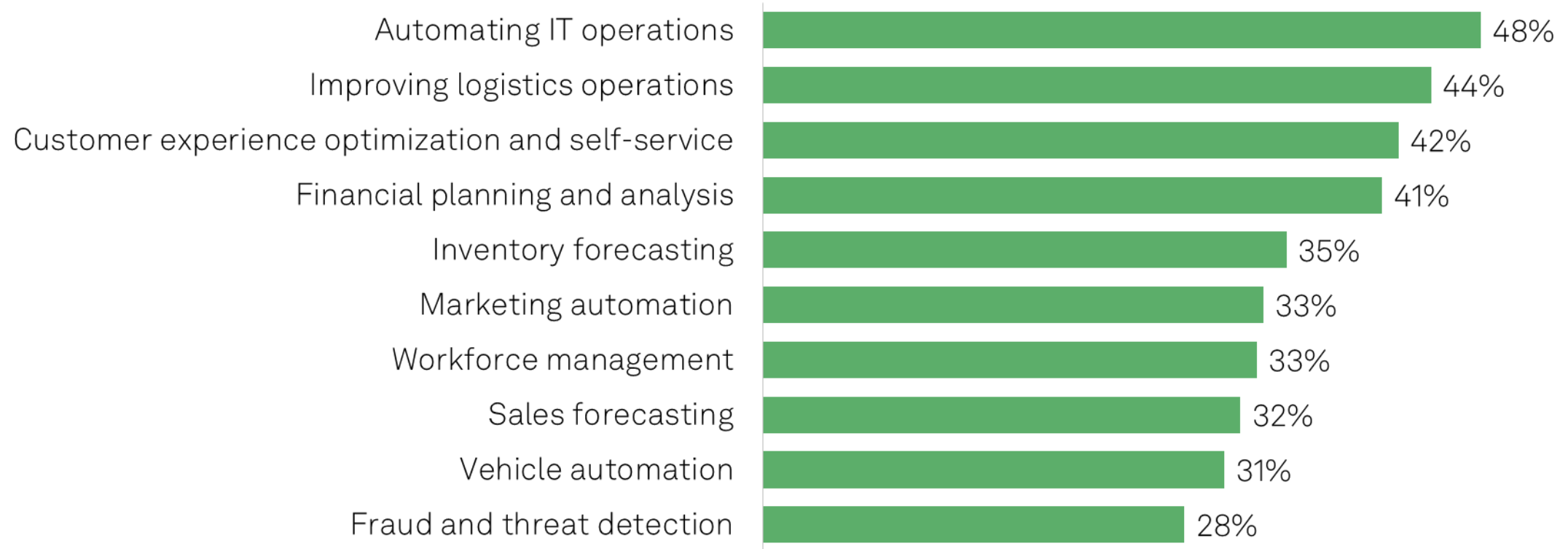


Q. Which of the following technologies do you consider to be the most impactful in supporting your organization's digital transformation? Please select up to 3.

Base: All respondents (n=506).

Source: 451 Research Supply Chain Digital Transformation Survey 2024.

Expected benefits of leveraging AI/ML technologies



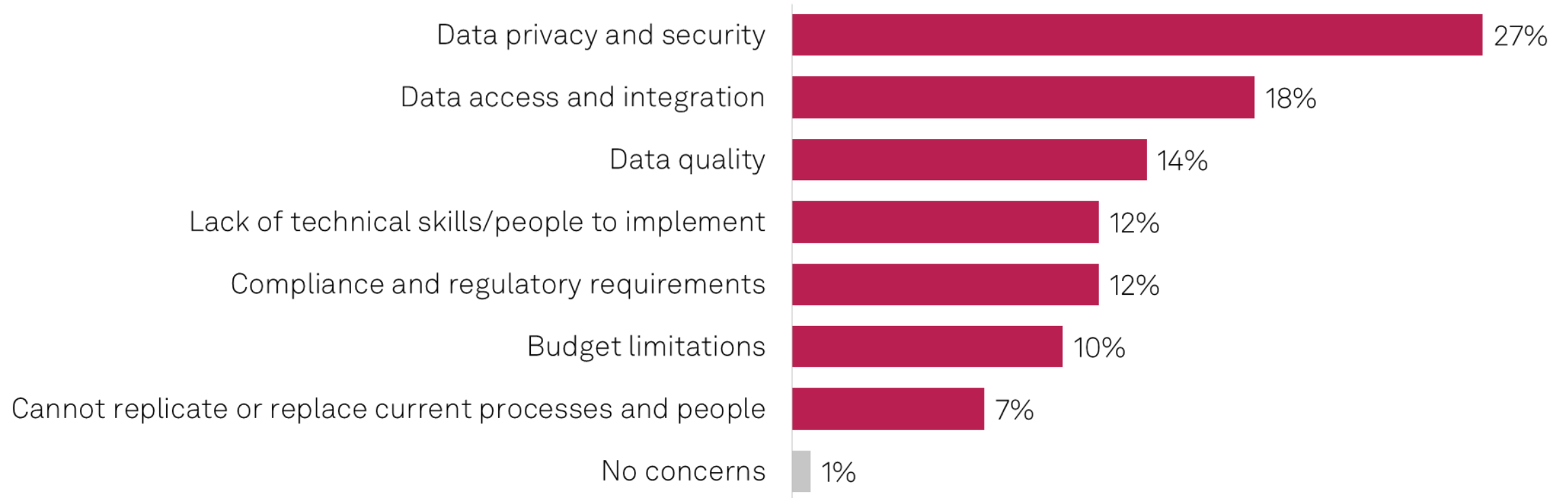
Q. What does your organization expect to gain by leveraging AI/ML technologies?

Please select all that apply.

Base: Organizations using or planning to use machine learning (n=457).

Source: 451 Research Supply Chain Digital Transformation Survey 2024

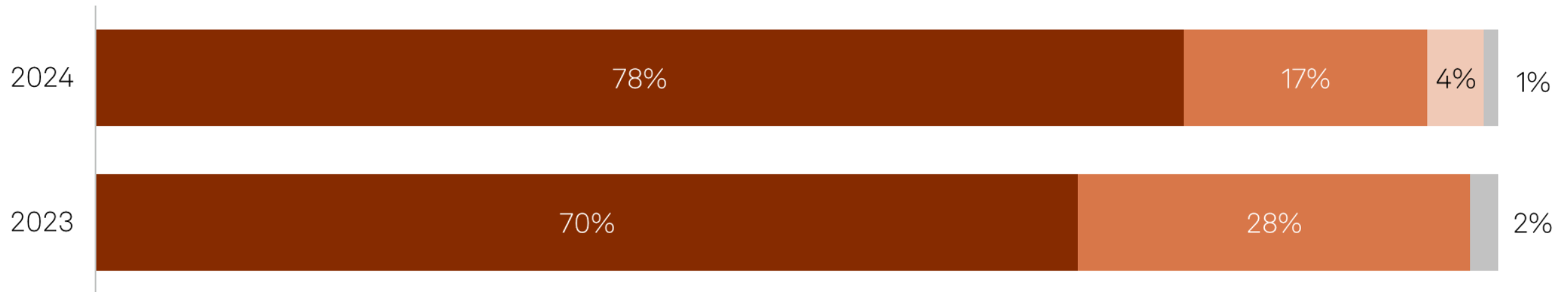
Primary concern with deploying AI/ML technologies



Q. What is your primary concern with deploying AI/ML technologies?
Base: Organizations using or planning to use machine learning (n=433).
Source: 451 Research Supply Chain Digital Transformation Survey 2024.

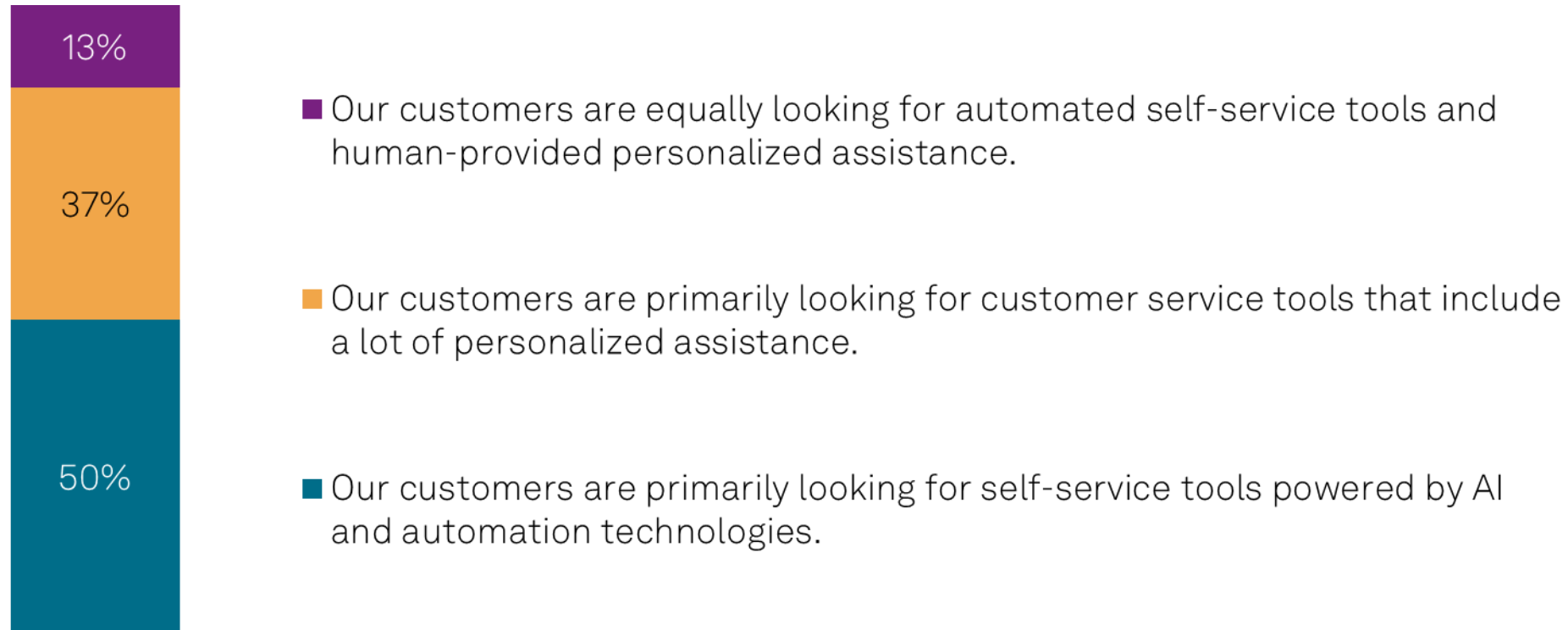
Use of outsourced transportation technology

- We currently outsource transportation technology from providers
- We don't outsource transportation technology from providers but plan to within the next two years
- We may outsource transportation technology from providers eventually, but not for at least another two years
- We don't outsource transportation technology from providers and have no plans to do so



Q. Does your organization outsource transportation technology from providers?
 Base: Shippers (n=299).
 Source: 451 Research Supply Chain Digital Transformation Survey 2024.

Perception of customers' appetite for AI, automation and self-service tools



Q. How much appetite do you see from customers for AI, automation and self-service tools?
Base: Logistics service providers (n=106).
Source: 451 Research Supply Chain Digital Transformation Survey 2024.

Most important problem respondents seek to solve with the help of technology



32%

Improve sustainability



29%

Improve operator and vehicle safety



18%

Control the costs of fuel, insurance and equipment



12%

Reduce unexpected time delays and accompanying fees



5%

Reduce deadhead miles

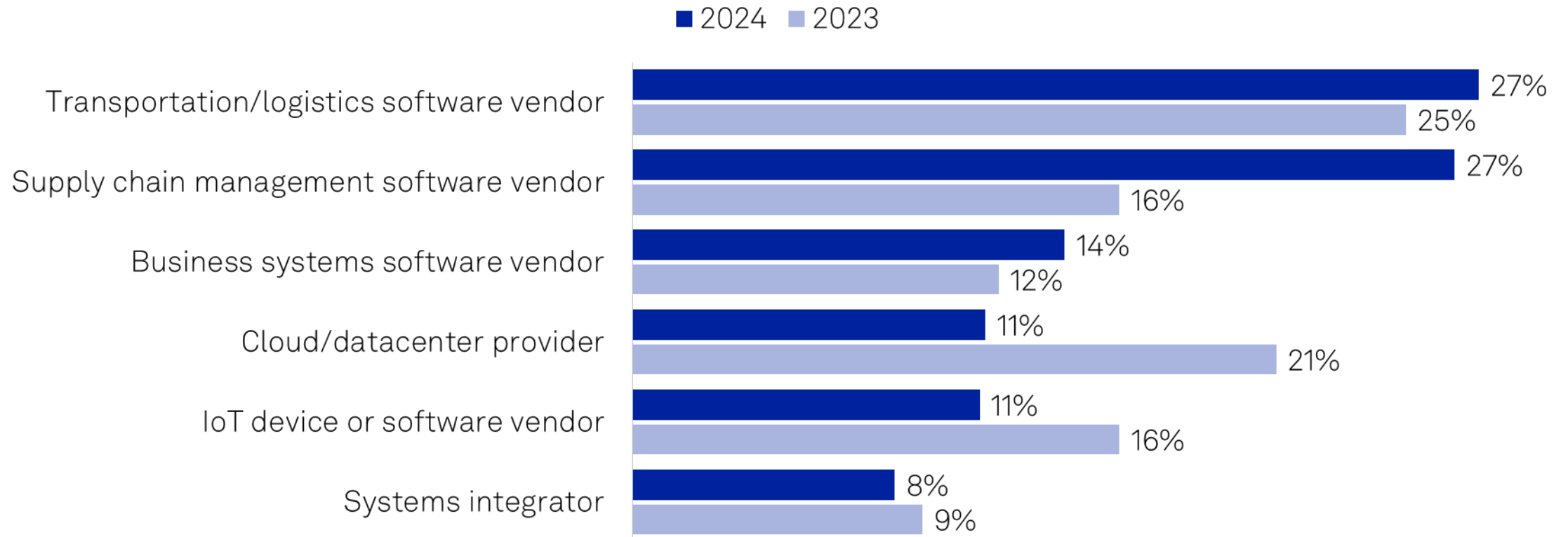


4%

Offset worker shortages

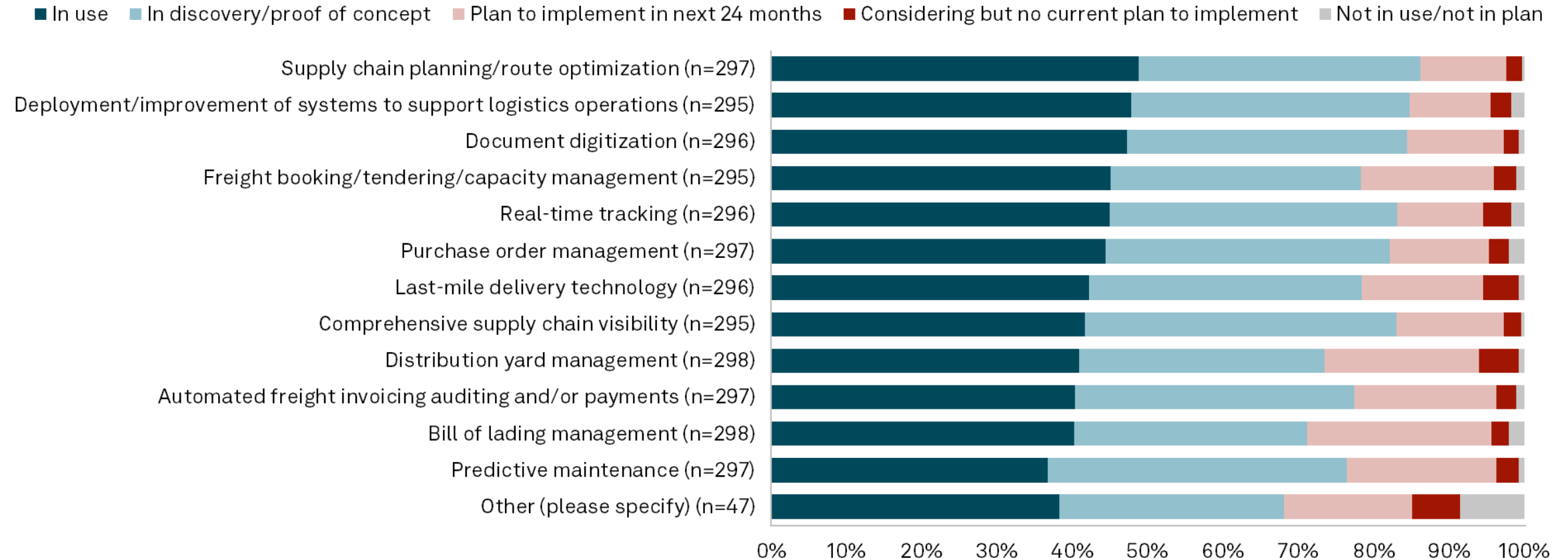
Q. What is the most important problem you seek to solve with the help of technology?
Base: Transportation asset-based carriers (n=100).
Source: 451 Research Supply Chain Digital Transformation Survey 2024.

Primary partner supporting digital transformation



Source: 451 Research Supply Chain Digital Transformation Survey 2023 and 2024.

Shippers' adoption status for selected digital transformation use cases

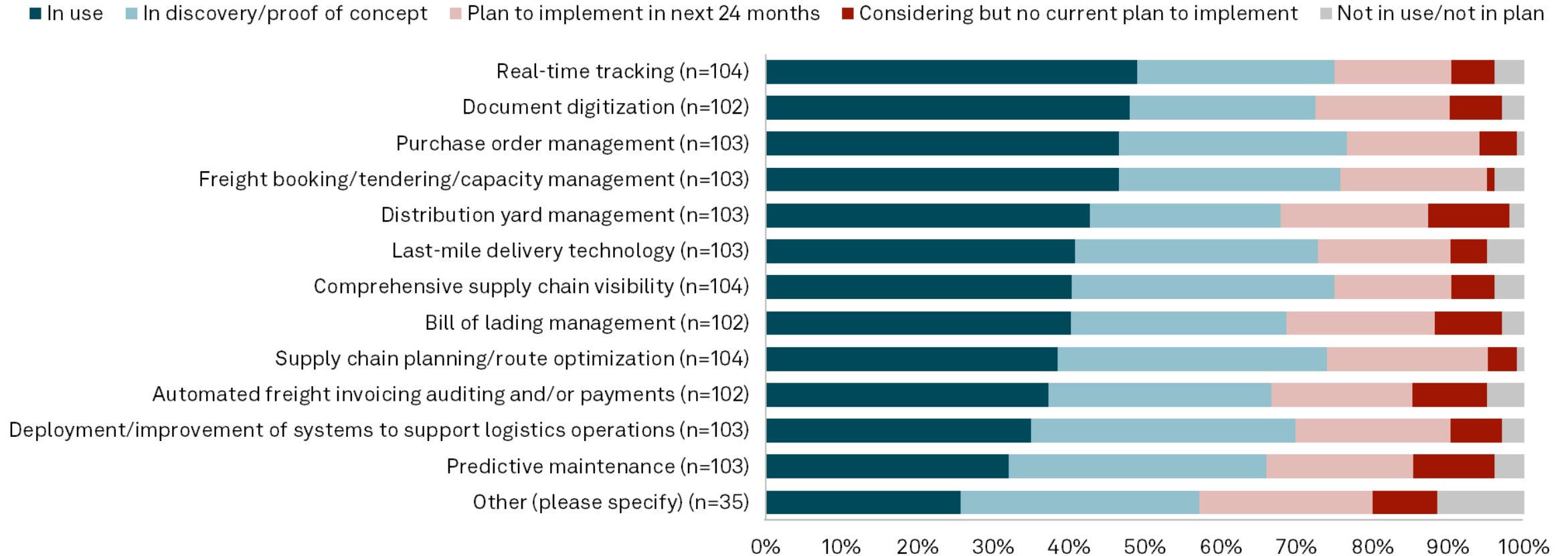


Q. What is the adoption status for the following digital transformation use cases?

Base: Shippers.

Source: 451 Research Supply Chain Digital Transformation Survey 2024.

Logistics service providers' adoption status for selected digital transformation use cases

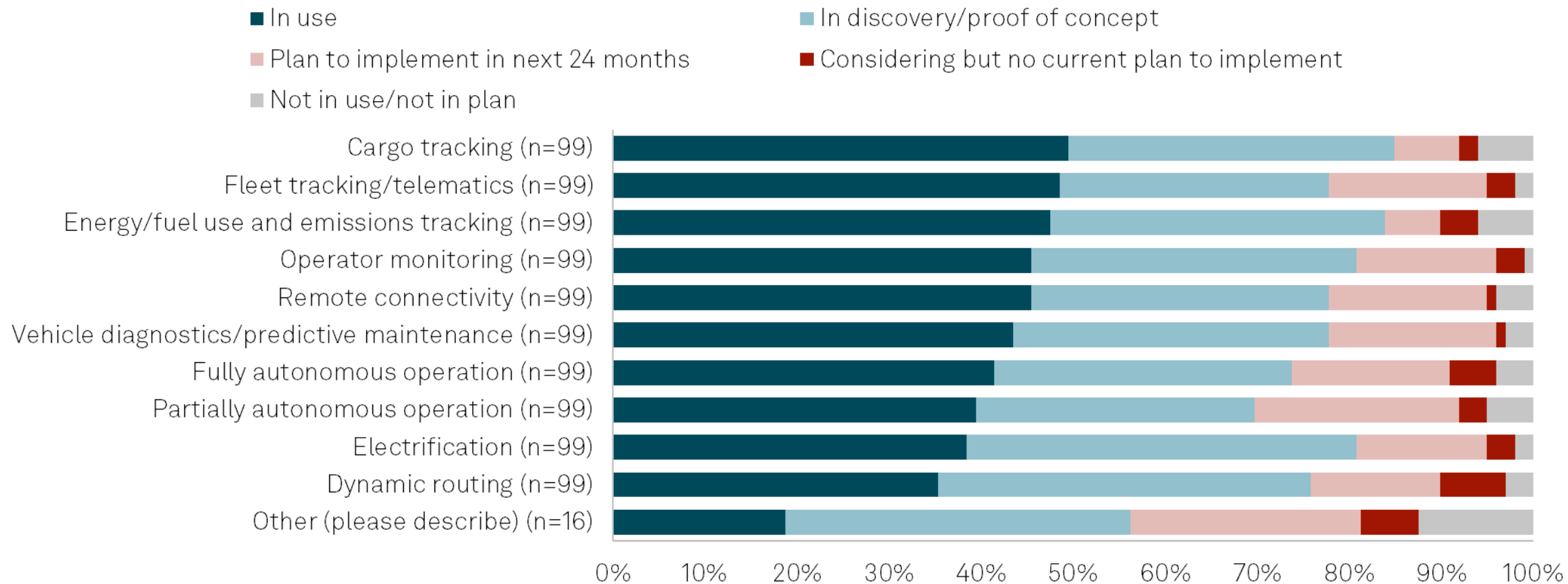


Q. What is the adoption status for the following digital transformation use cases?

Base: Logistics service providers.

Source: 451 Research Supply Chain Digital Transformation Survey 2024.

Carriers' adoption status for selected digital transformation use cases



Q. What is the adoption status for the following digital transformation use cases?

Base: Carriers.

Source: 451 Research Supply Chain Digital Transformation Survey 2024.

Interested in this research?

- Visit us in the S&P Global Lounge booth, located right outside this session.
- Email me at mark.fontecchio@spglobal.com
- Connect with me on LinkedIn

