



Logistics Executive Survey

The New Normal of Logistics

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Executive Summary

What does the future of logistics look like? Will lessons and practices adopted by the COVID-19 pandemic continue past 2021? Pulling from responses of more than 150 C-suite and senior executives across manufacturing, retail, third-party logistics (3PL), transportation, and warehousing, with responsibility for logistics and operations in the U.S., we have identified the most pressing priorities and investments of today's logistics professionals post-pandemic.

Conducted from March-April 2021, the Logistics Executive Survey reveals that logistics executives plan to maintain and optimize convenient fulfillment options (38%) and implement and/or enhance their warehouse management systems (WMS) and cloud infrastructure (48%). The research also reveals that 57% of logistics executives plan to invest in more sustainable upstream operations (materials sourcing, suppliers, and manufacturing) to maximize sustainability throughout the supply chain.

Priorities

Sustainability Efforts and Consumer Experiences

- 38% of logistics executives state that maintaining and optimizing convenient fulfillment options (curbside pickup, BOPIS, at-home delivery) is the most important factor for enhancing consumer experiences post-COVID-19
- 59% of logistics executives and, within that group, 71% of those in consumer manufacturing plan to offer flexible delivery windows for online orders to maximize sustainability throughout the supply chain

Reinstating Sustainability Efforts

- 54% of logistics executives paused their sustainability initiatives due to the pandemic. Of those that paused:
 - 80% have either fully or partially reinstated them
 - 20% have not reinstated them at all

In addition to offering flexible delivery windows, logistics executives that plan to enhance sustainability:

- 57% are seeking out more sustainable upstream operations (materials sourcing, suppliers and manufacturing)
 - 65% of those in discrete manufacturing (industrial and automotive) plan to seek out more sustainable upstream operations (materials sourcing, suppliers and manufacturing)
- 50% are implementing eco-friendly packaging options

Meeting Customer Expectations Through Technology Investment

To meet growing demands while reducing costs, nearly half (48%) of logistics executives plan to implement and/or enhance their WMS and cloud infrastructure in the next 12 months. Logistics executives also plan to implement/enhance plans with the following:

- 42% said artificial intelligence (AI) and/or machine learning (ML)
- 42% said sales and operations planning (S&OP) and/or sales and operations execution (S&OE)
- 41% said transportation management systems (TMS)

Combating the Labor Shortage

- 40% are being more lenient on specific job/industry experience requirements to attract and retain labor/talent in a tight labor market
- 54% plan to invest in workforce management technologies in the next 12 months
- 51% plan to invest in enhanced workforce training procedures in the next 12 months
- 48% plan to offer more flexible scheduling options

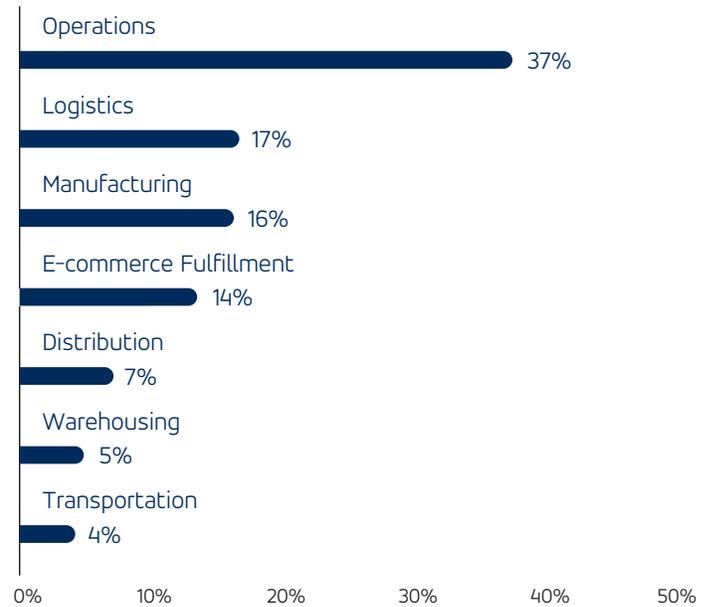
Firmographics

Industry Sector:

Option	Responses %
Retail/Wholesale Trade	32%
Manufacturing (discrete; industrial and automotive)	18%
Manufacturing (consumer)	13%
Other	10%
Transportation	9%
Healthcare	8%
Shipping/Distribution	5%
Computer Hardware	2%
Consumer Packaged Goods	2%
Pharmaceuticals	1%

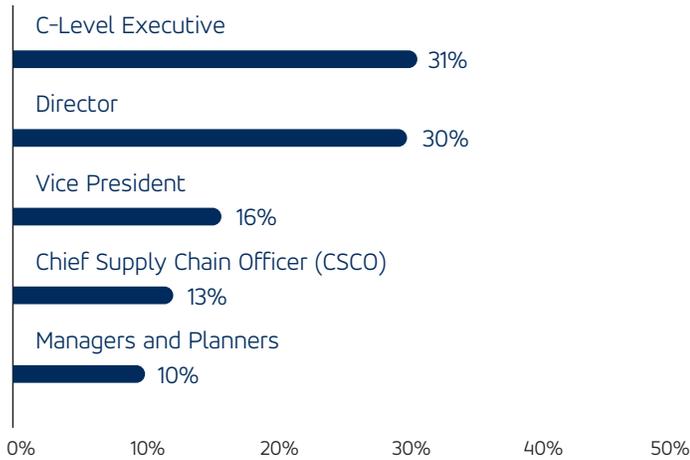
Sample Size: 153 (100% of Respondents); Note: Only a single option could be selected.

Which best describes your primary role when it comes to Supply Chain Management?



Sample Size: 153 (100% of Respondents); Note: Only a single option could be selected.

Which of the following best describes your title?



Sample Size: 153 (100% of Respondents); Note: Only a single option could be selected.



Survey Results

Which of the following is most important for enhancing consumer experiences as we transition to a post-COVID environment?



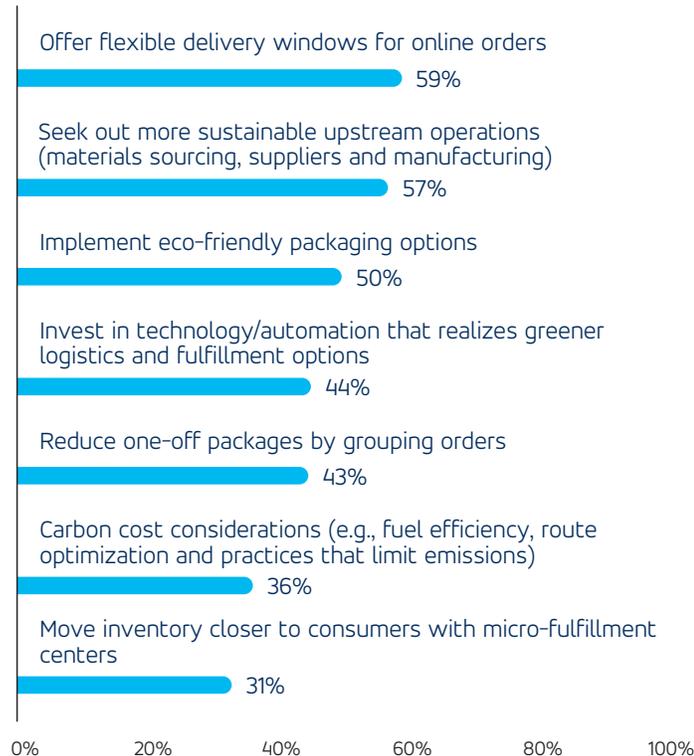
Sample Size: 153 (100% of Respondents); Note: Only a single option could be selected.

What is the state of your company's sustainability initiatives?



Sample Size: 153 (100% of Respondents); Note: Only a single option could be selected.

How do you plan to maximize sustainability throughout the supply chain?

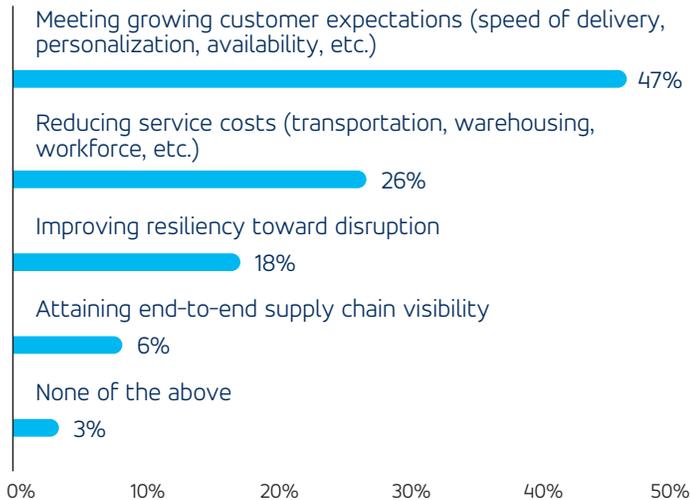


Sample Size: 138 (90% of Respondents); Note: Respondents could select multiple options.



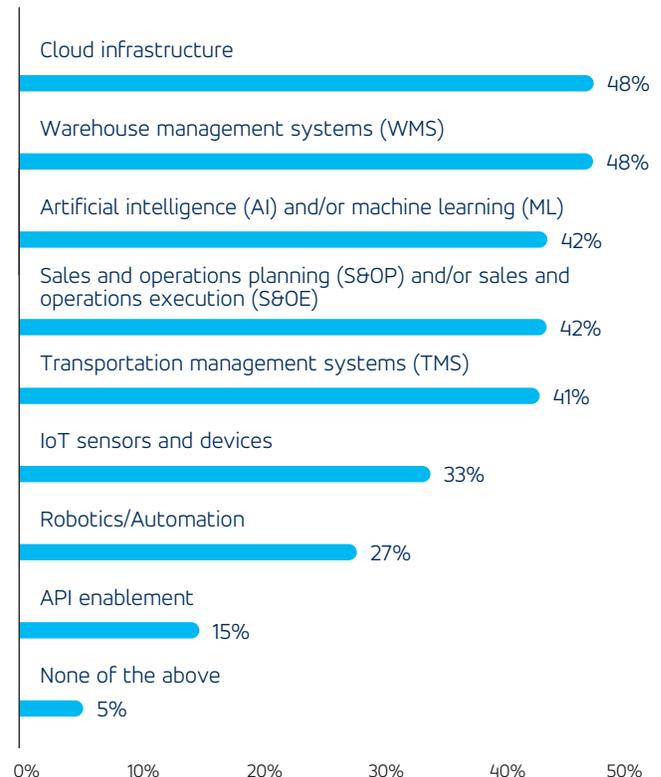


What is your biggest driver for technology investment as we transition to a post-COVID environment?



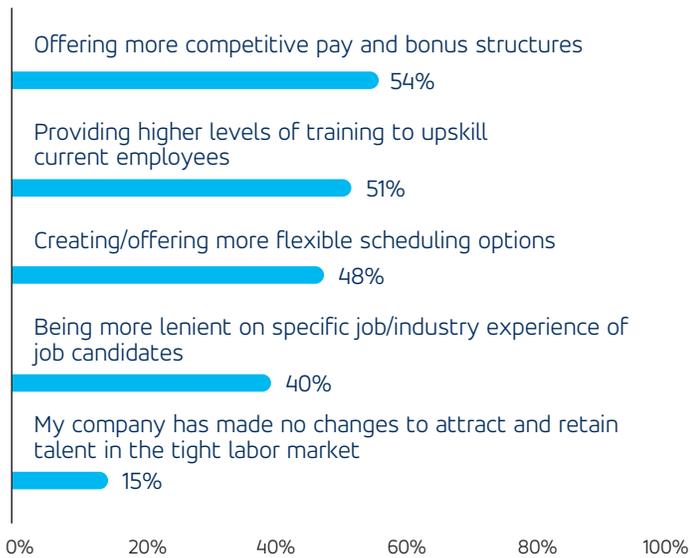
Sample Size: 153 (100% of Respondents); Note: Only a single option could be selected.

Which of the following areas of logistics technologies do you plan to implement and/or enhance in the next 12 months?



Sample Size: 153 (100% of Respondents); Note: Respondents could select multiple options.

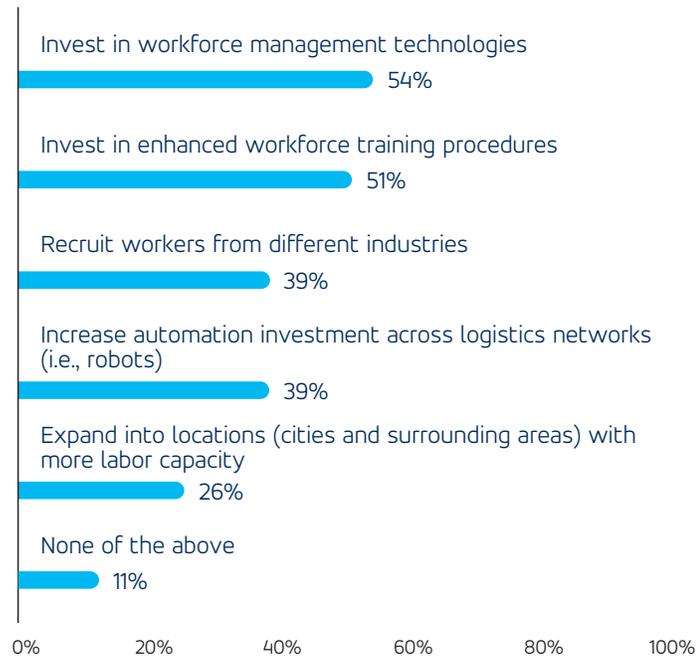
How are you attracting and retaining labor/ talent in a tight labor market?



Sample Size: 153 (100% of Respondents); Note: Respondents could select multiple options.



How are you planning to address the tight labor market over the next 12 months?



Sample Size: 153 (100% of Respondents); Note: Respondents could select multiple options.

Company Inventory Comparison



Sample Size: 153 (100% of Respondents); Note: Only a single option could be selected.