

INDUSTRY SNAPSHOT: MANUFACTURING



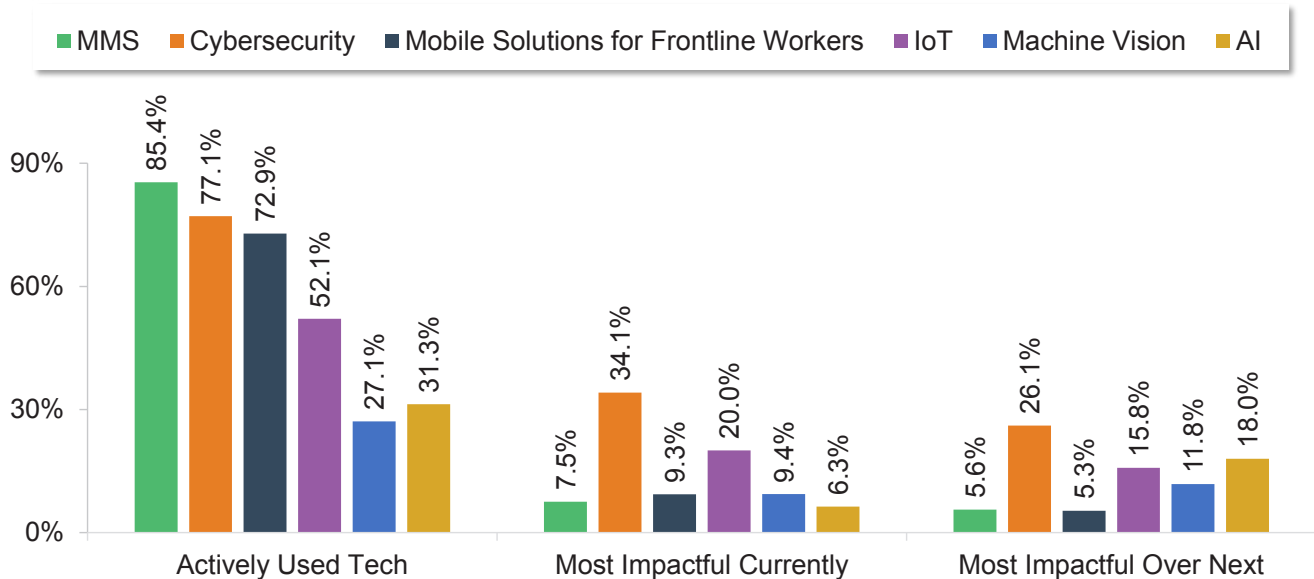
At **30.5%**, the rate of Innovators among manufacturing organizations is well below the overall average of 37.7%. Manufacturers lag behind other industries in their technology deployments and have a lower-than-average optimization of those solutions. The primary barriers to their technological adaptability are:

- > A lack of executive support at **40.2%** (the only industry to indicate this as their top barrier), and
- > Organizational decision making (**35.4%**)

Manufacturers prioritize their top implemented technologies a little differently than other industries in that ‘mobile solutions for frontline workers’ is deployed proportionally more frequently. Typically, much of their tech stack involves handheld scanners, handheld computers, tablets and forklift-mounted units used by shop floor workers and logistics employees.

Not surprisingly, the role of robotics is more important in manufacturing than any other industry. While only **23.2%** of manufacturers actively use robots to replace repetitive tasks today, by 2030 the rate of manufacturers believing robotics to be the single most impactful tech jumps from **1.7%** to **14.3%**. Furthermore, although robotics will not replace human labor on the shop floor entirely, almost **50%** of manufacturing IT decision makers do believe factory floor workforces will shrink by over **10%** in the next 5 to 10 years due to automation.

MANUFACTURING DEPLOYMENTS AND TECH IMPACT PERCEPTIONS OVER TIME



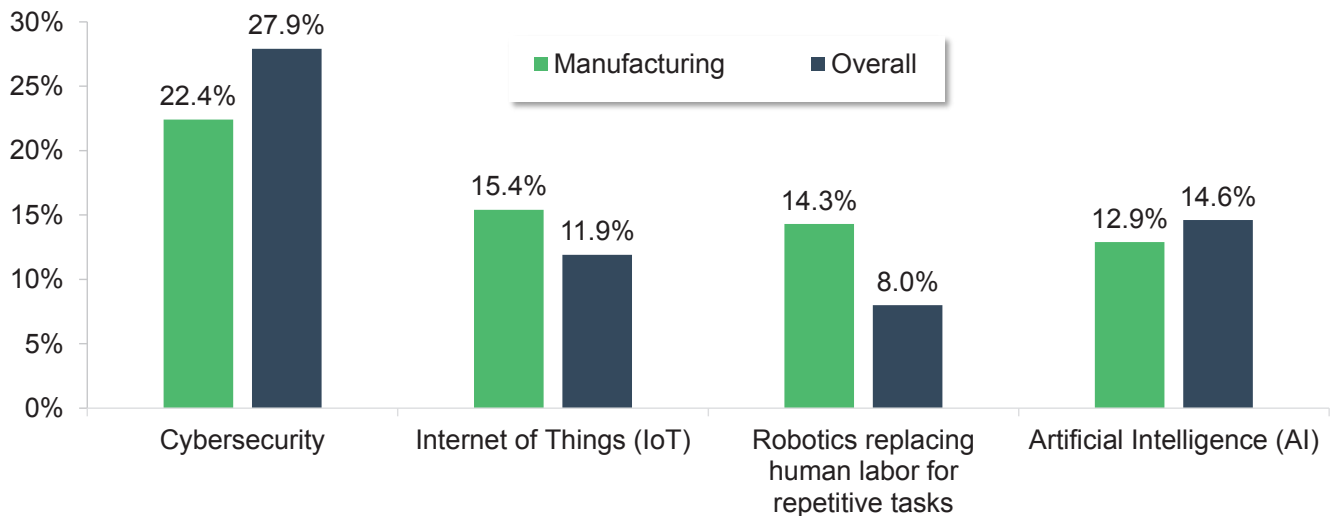
Consequently, the mobile solutions used by frontline workers will shift in purpose and in form, migrating from repetitive tasks and more heavily into workflows such as inspections, maintenance and technically demanding tasks; manufacturers would do well to seek external help to guide and manage such a significant transition.

MANUFACTURING AT A GLANCE

MANUFACTURING'S MOBILE MATURITY

30.5% to 37.7%: The rate of Innovators in manufacturing compared to the overall average, placing them far behind in mobile maturity. Still, only **17.1%** of manufacturing organizations feel at high risk of tech-led disruption, which is lower than the overall average of **20.9%** and lower than any other single industry segment. This suggests a level of comfort among manufacturing operations regarding the capabilities of their tech stacks despite their lack of innovation.

MOST IMPACTFUL OVER NEXT 10 YEARS



Manufacturing organizations show a significant jump in the perceived importance and impact of robotics over the next ten years. Overall, robotics replacing human labor for repetitive tasks does not break the top five for most impactful technologies over the next 10 years overall at **8.0%**.

