

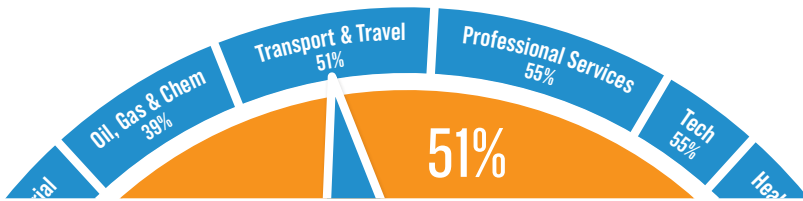
DIGITAL PULSE— TRANSPORT AND TRAVEL

“IT still has a big part to play, but these organizations crave a single digital leader.”

Just over half (51%) of Transport and Travel (T&T) businesses expect to be moderately or massively disrupted by digital in the next 12 months. It is positive that nearly three-fourths of these organizations have a digital strategy and that 40% believe technology is a major driver of the business strategy for their company. From a people perspective, the picture is mixed. While 29% of respondents agreed that they have the right people to define their digital strategy, more than one in four respondents disagreed with the same statement. When it comes to the ownership of digital, Marketing dominates in many organizations, but IT still is the primary or secondary owner in six of the 11 digital disciplines. Following that trend, the CIO owns the digital strategy in 20% of Transport and Travel organizations, more than in any other industry. Conversely, only 3% of respondents cited having a chief digital officer, a low matched only in the Technology sector. It is not a surprise then that the two biggest barriers to effective digital business for these companies are the Lack of Single Head of Digital and Departments Competing for Ownership of Digital.

Digital Disruption Barometer

Transport and Travel sits in the middle of the disruption barometer, well above Oil, Gas and Chemicals and a short distance from more mature sectors like Business and Professional Services.

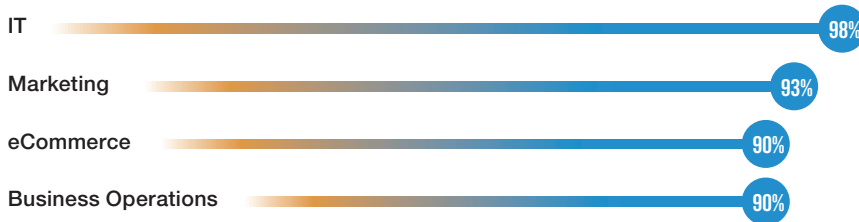


51% of Transport and Travel executives surveyed responded that their business would be moderately or massively disrupted by digital in the next 12 months.

Five Functions Most Impacted by Digital

Transport and Travel executives expect digital to have a sweeping impact across tech-minded and customer-facing functions.

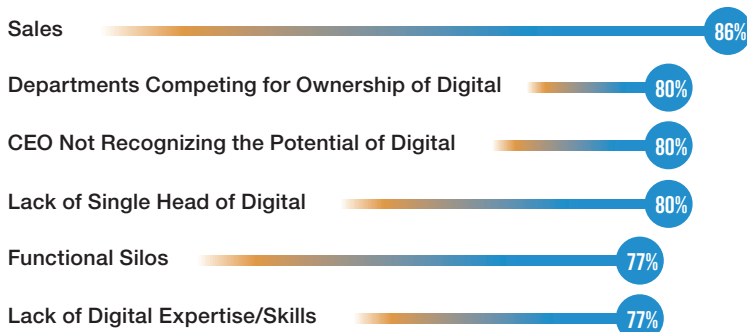
Percentage of Transport and Travel Executives: Functions Most Impacted by Digital in the Next 12 Months



Five Top Barriers to Effective Digital Business

When asked what the biggest barriers to effective digital business are, Transport and Travel executives emphasized challenges related to skills, leadership and organizational structure.

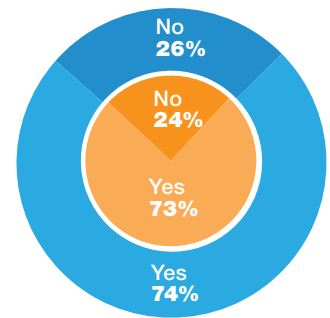
Percentage of Transport and Travel Executives Rating Barriers as of High or Moderate Significance



Structure and Strategy

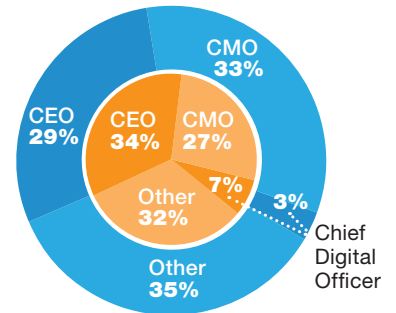
Does your company have a digital strategy?

● T&T
● Total



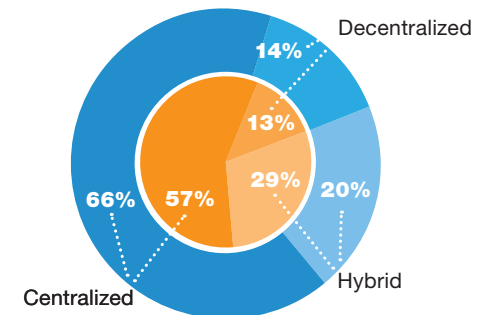
Who owns digital in your organization?

● T&T
● Total



How is digital organized in your organization?

● T&T
● Total

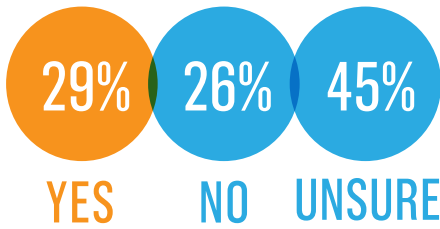


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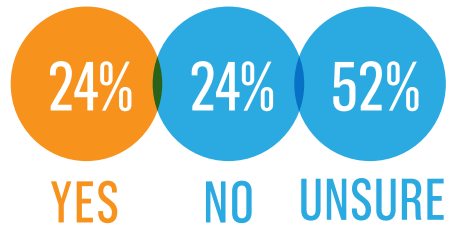
The People Challenge of Digital

People are the driver of digital in an organization. The below shows how many Transport and Travel executives agreed and disagreed with two key questions.

Do you have the right people to define your digital strategy?



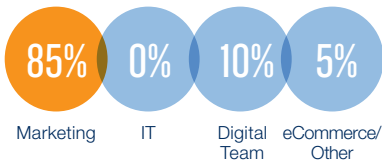
Do you have the right people to execute your digital strategy?



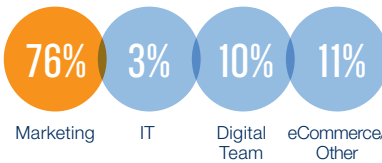
Ownership of Digital within Organizations

Across organizations, various elements of digital are owned by different parts of the organization. The below shows the percentage of functions that own specific elements of digital in respondent organizations. While Marketing often was cited as an owner, the data demonstrate that little consensus has emerged across Transport and Travel organizations as digital's logical home(s).

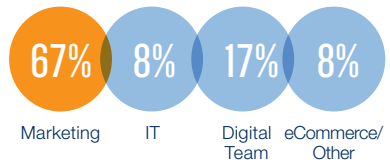
Social Media Marketing



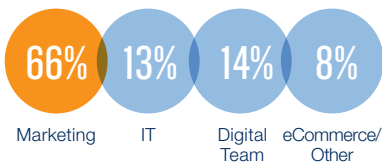
Customer Mobile App Development



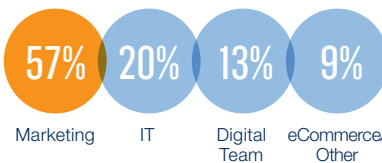
Digital Media Selection



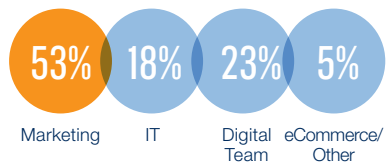
Social Media CRM



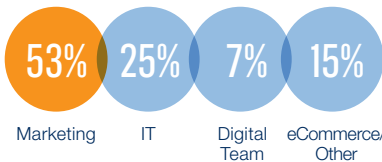
Vendor Selection



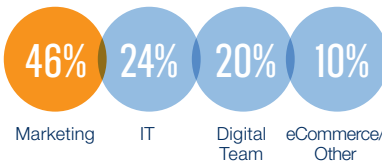
Customer Experience Strategy



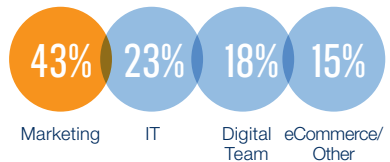
Employee Digital Engagement



Customer Analytics

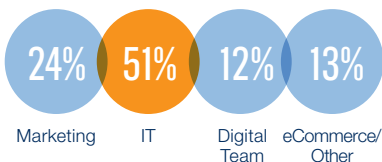


Web Design

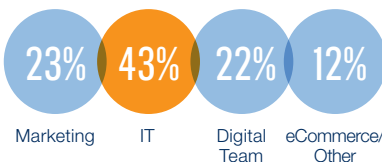


Notable exceptions include **CRM** and **Web Strategy**, which most often are owned by IT.

CRM



Web Strategy



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