

# The State of Connected Operations 2023





## Leaders across the globe are reimagining their physical operations.

Physical operations are the infrastructure of the 21st century. They include fleets of thousands of vehicles, complex equipment, and worksites across states and countries. They are powered by people – from the skilled drivers who transport essential goods to your supermarket, to the crane operator who moves heavy materials across a construction worksite, to the teams that ensure the WiFi you're using to view this very report is up and running. Physical operations are the lifeline that power our global economy. Without them, our world would stop.

Organisations that manage physical operations are within industries that drive more than 40% of the global gross domestic product (GDP), from transportation to construction, warehousing, utilities and more. Often working behind the scenes, the people who power these operations have faced an incredible array of challenges over the last few years. Rising costs. Global supply chain disruptions. Increasing regulatory pressures. And yet, they continue to keep our world moving. How?

These organisations have been through times of incredible upheaval before. They've weathered unprecedented economic, political, and environmental challenges and have emerged more resilient. For many leaders at these organisations, today's toughest challenges are not an existential threat, but rather an invitation for reinvention.



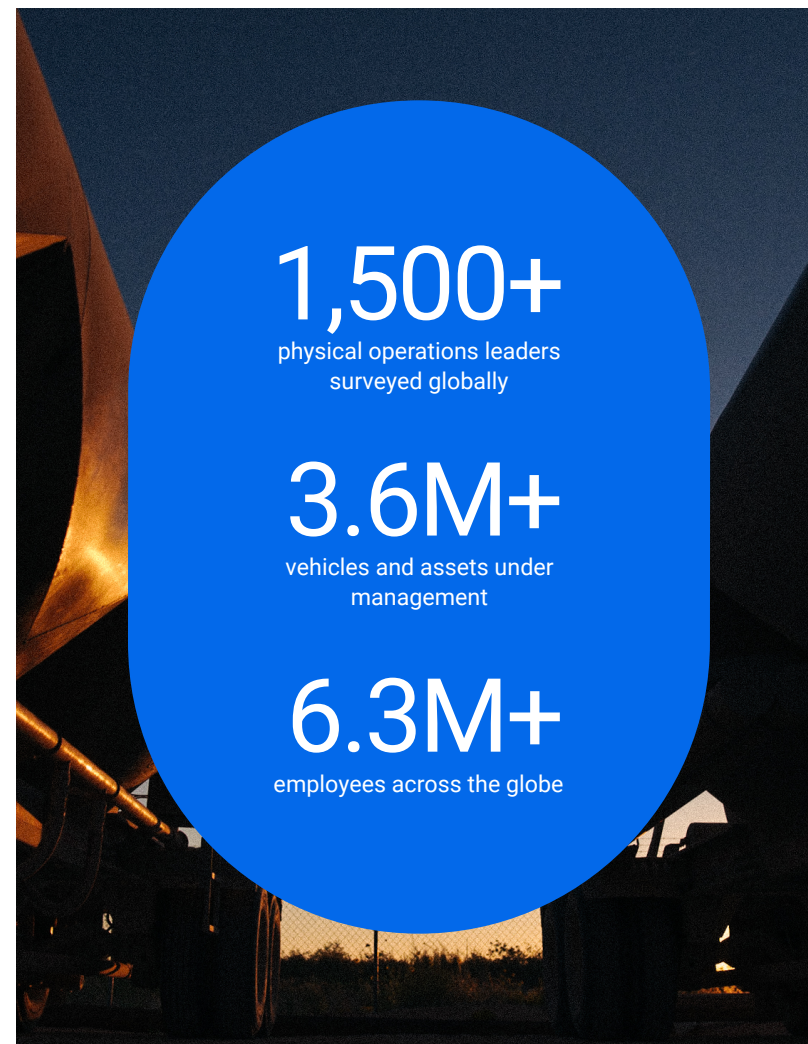
Last year, our inaugural State of Connected Operations Report revealed a tipping point in the digital transformation of physical operations. As organisations connect their assets and systems to the cloud, they are transforming into Connected Operations™ – organisations with centralised, real-time visibility that empowers them to operate more safely, efficiently and sustainably.

Today, we are at the beginning of a massive transformation. There's no denying that monumental technological shifts are underway, from autonomous vehicles to alternative energies, robotics and more. How are today's leaders adapting to these technological advancements? How will this shape the operations workforce for years to come? And what new revenue streams are early adopters tapping into?

In moments of intense pressure, the greatest organisations don't shy away from change. They embrace it. With the 2023 State of Connected Operations Report, we uncover how today's leaders are capitalising on this moment of incredible transformation to fundamentally reimagine how they operate.

## Inside the Report

The 2023 State of Connected Operations Report explores findings from a survey of more than 1,500 physical operations leaders across the world: the United States, Mexico, United Kingdom, Ireland, France, Germany and Benelux (Belgium, the Netherlands and Luxembourg). With this year's report, we uncover how today's leaders are navigating economic and geopolitical unpredictability. Our findings indicate that organisations are continuing to connect their operations to increase revenue, empower employees and remain resilient in the face of global uncertainty.





## The Data-Driven Decision Makers Behind the Insights

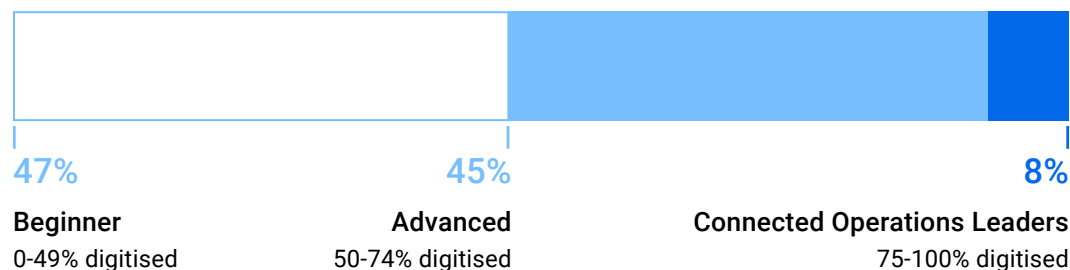
The leaders who participated in this report are C-suite executives, presidents, vice presidents, or directors at organisations that manage physical operations across a range of industries and sectors, including transportation and logistics, construction, manufacturing, utilities and more. 93% have decision-making capabilities regarding technology choices in their business. These organisations manage thousands of fleet vehicles, powered and unpowered assets, and distributed facilities and job sites, as well as millions of employees around the world.

**8% of respondents are Connected Operations Leaders: These individuals report the highest level of digital maturity across their organisations' operations.**

Compared to organisations in the beginning stages of digitisation, Connected Operations Leaders are 5x more likely to rate the productivity of their workforce as “excellent”, and 6x more likely to report exceeding their financial goals by 25% or more.

**Look for this highlighted text throughout the report to see what Connected Operations Leaders are doing differently.**

How would you rate the digital maturity of your organisation's physical operations?





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# Executive summary UK&I

## Investing in workforce development isn't a perk, it's a priority.

In just two years, almost 1 in 5 operations employees in UK&I are predicted to be doing jobs that don't exist today.

## Macroeconomic pressures demand efficiency-making data a competitive advantage.

72% are increasing their technology budgets this year, suggesting that while the state of the global economy may be in flux, technology is seen as a wise investment.

## AI and automation will be table stakes by 2024

83% of leaders in the UK&I plan to use generative AI and 92% plan to use automation to modernise their operations by 2024.

## Sustainability is fueling the invention of new revenue streams.

By 2025, 58% of leaders will monetise their EVs through pay-per-use or subscription charging stations, while 59% will sell energy back to the grid.





## In 2023, leaders are stepping up investments in their workforce and technology.



### Digitisation yields widespread benefits and boosts profits.

Last year, leaders reported increased net profits from digital investments. This year, 50% report increased safety and improved compliance as a result of digital investments.

**For Connected Operations Leaders, these digital investments resulted in higher employee productivity (64%), higher revenue (59%) and increased net profit (56%).**



### Upskilling is critical to employee productivity and retention.

Last year, leaders identified easy-to-use technology as a key factor in recruiting and retaining employees. In 2023, 56% of leaders say improving workforce productivity with new technologies is a critical priority for their organisation. Leaders predict that by 2025, 55% of their employees in the field will rely completely on digital workflows to perform day-to-day tasks.



### The future of physical operations is connected.

Last year, 94% of leaders reported “breaking down data silos” was critical to their survival in the next decade. In 2023, 70% agreed “our data is siloed, decreasing efficiency,” indicating a rapid shift towards digital, connected solutions that bring siloed data together.

# 01

**The global economy is in flux.  
Leaders are capitalising to  
reinvent their operations.**

In today's macroeconomic environment, data is a competitive advantage. Organisations that don't optimise their supply chains and invest in real-time data will be left behind.







Macroeconomic pressures  
are demanding adaptation.

## Top trends you need to know.

### IN 2023

#### Top 3 concerns of organisations, globally:

- 01 – Supply chain delays and shortages
- 02 – Volatile fuel prices
- 03 – Cross-border travel and trade

#### Supply chain strategies are evolving rapidly.



of all leaders plan to use onshoring to increase the predictability and efficiency of supply chains in 2023.

#### Real-time data is a must have.



of all leaders say having accurate, real-time operational data is critical to decision-making in 2023.



of all leaders are increasing their technology budget this year; only 33% have kept it the same or decreased it.

## Supply chain strategies are evolving rapidly.

Supply chain delays and shortages were the most commonly identified areas of concern for leaders, followed closely by volatile fuel prices and cross-border travel and trade.

Notably, US organisations are more concerned with supply chain delays and shortages, with 51% of US organisations saying supply chain delays and shortages are a top concern vs 43% of organisations outside the US.

### Where are leaders turning to evolve their supply chain?

- The majority of leaders identified onshoring, vertical integration, nearshoring and friendshoring as the top strategies they plan to use in 2023.
- 66% of French organisations plan on leveraging friendshoring – more than any other country.
- **Among Connected Operations Leaders, interest in onshoring is 20% higher and interest in nearshoring is 24% higher compared to global averages.**

Three years after the pandemic spurred global disruption, supply chain delays and shortages are still leaders' top concern in 2023 – above fuel prices, inflation and even the risk of recession. Now, leaders are no longer satisfied with making small adjustments; they are fundamentally rebuilding their supply chains to be more agile today and more resilient for the long term.

To increase supply chain predictability and efficiency, **95% of leaders** plan to implement at least one of these increasingly popular strategies this year:

- **Onshoring** – transferring an overseas business operation back to its country of origin.
- **Nearshoring** – transferring an overseas business operation to another, nearby country.
- **Friendshoring** – transferring an overseas business operation to countries that are political or economic allies.

### TOP EMERGING SUPPLY CHAIN STRATEGIES

	CONNECTED OPERATIONS LEADERS	ADVANCED	BEGINNER
#1	ONSHORING	ONSHORING	VERTICAL INTEGRATION
#2	NEARSHORING	FRIENDSHORING	FRIENDSHORING
#3	FRIENDSHORING	NEARSHORING	ONSHORING





“We have noticed large growth in the regional personnel transportation market, due to the situation left by the COVID pandemic and the strong trend of nearshoring in Mexico. For this reason, we are making an investment like never before in the area of information technology that will help us to be ready to meet the needs of current customers plus the potential market that lies ahead.”

– OSVALDO SANCHEZ

*TISAL, Mexico*

## Savvy companies are investing in data as a competitive advantage.

Beyond supply chain challenges, top concerns this year include volatile fuel prices (45%), the risk of recession (42%), inflation (40%) and labour shortages (40%). Despite these concerns, operations budgets won't feel the pinch this year. On the contrary, organisations are doubling down on initiatives to modernise their operations.

### What sets leaders apart in this climate?

- **90% of leaders say having accurate, real-time operational data is critical to decision-making in 2023** and 90% agree that data is a competitive advantage for their organisation.
- **2 in 3 leaders say their organisation's 2023 budget for technology investments to modernise their operations increased**, while just 33% say it has stayed the same or decreased compared to last year.

The fact that technology budgets continue to increase, especially during this macroeconomic climate – indicates how confident leaders are in the ROI of digital technology to modernise physical operations. In fact, leaders report widespread benefits as a result of their technology investments: increased safety (50%), improved compliance (50%), higher revenue (43%) and increased net profit (43%).

97% of Connected Operations Leaders said their 2023 budget for technology investments to modernise their operations **increased or stayed the same** this year, compared to 83% of digitisation beginners.

CONNECTED OPERATIONS LEADERS

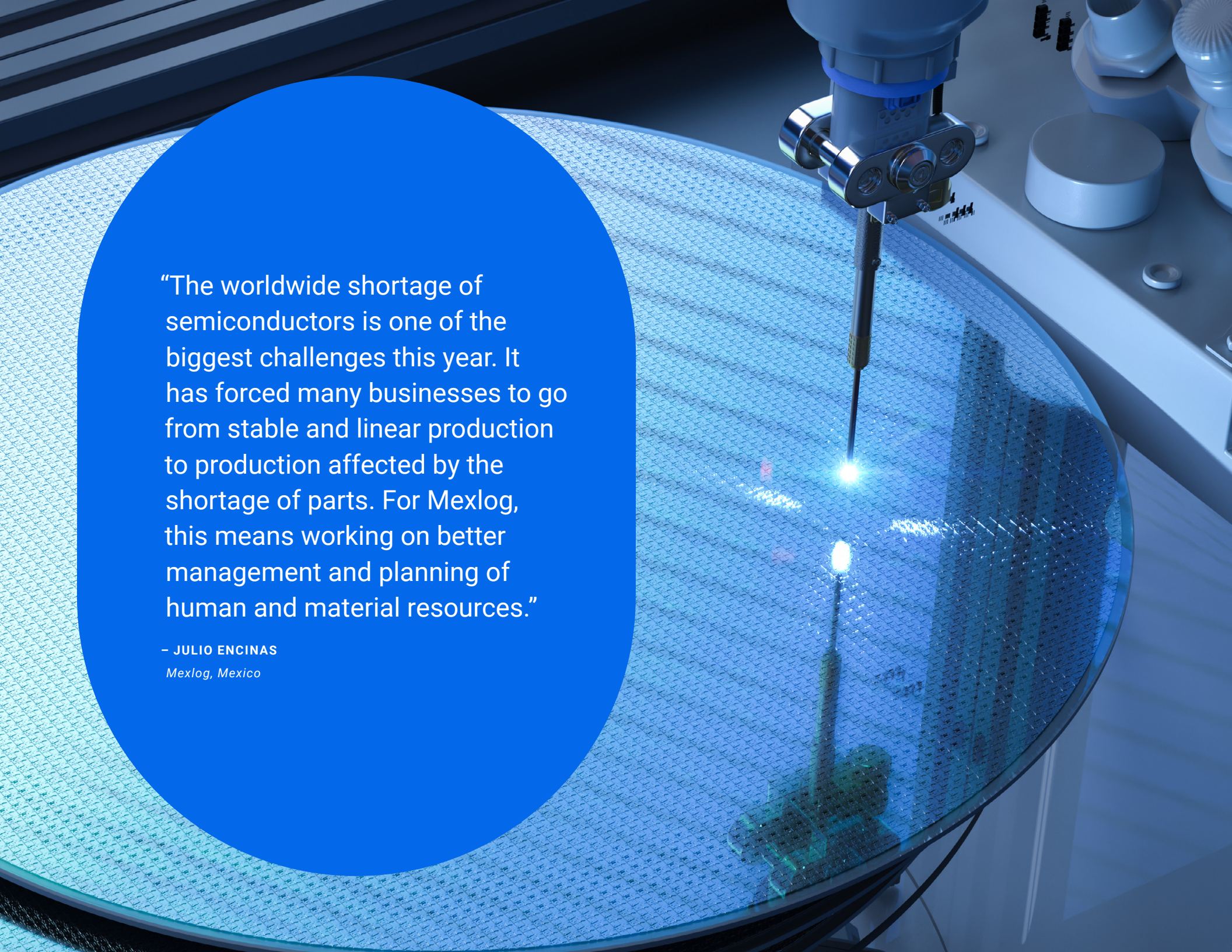
97%

BEGINNERS

83%







“The worldwide shortage of semiconductors is one of the biggest challenges this year. It has forced many businesses to go from stable and linear production to production affected by the shortage of parts. For Mexlog, this means working on better management and planning of human and material resources.”

– JULIO ENCINAS

*Mexlog, Mexico*



# 02

**The workplace and workforce are rapidly changing. Leaders must adopt technology to meet expectations.**

Automation, digitisation and AI are key to improving workforce productivity. As these technologies reshape the workforce, leaders are uncovering new ways to retain and upskill employees.







Upskilling is critical  
and digitisation is  
empowering employees.

## Top trends you need to know.

### IN 2023

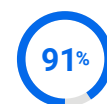
**Workforce development isn't a perk – it's a priority.**



of all leaders report that training, upskilling and reskilling employees to use new technologies is a top workforce priority this year.

### BY 2024

**Automation adoption is accelerating.**



of all leaders will use automation to modernise their operations by 2024.

### BY 2025

**The future of work is rapidly changing.**



operations employees are predicted to be doing jobs that don't exist today by 2025.



of employees in the field will rely on digital workflows to perform day-to-day tasks by 2025.

# Leaders are redefining the status quo with new technology.

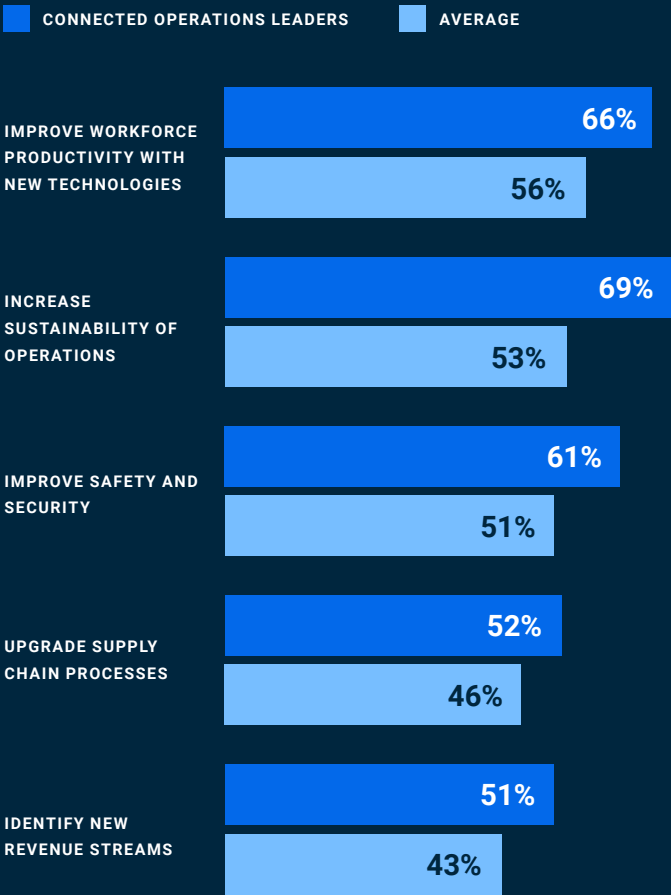
Many emerging technologies have stolen the spotlight this year, from AI chatbots to virtual reality, as individuals and organisations are empowered to do more with less. While some trends may stick and some may fizzle out, technology that improves workforce productivity is here to stay.

**A majority of all leaders (56%) – and an even greater majority of Connected Operations Leaders (66%) – report that improving workforce productivity with new technologies is a critical priority for their organisation this year.**

This increasing interest is not limited to Connected Operations Leaders; across the board, interest in technology to improve workforce productivity was the number one priority for all leaders, above increasing sustainability, improving safety and security, and even identifying new revenue streams.



56% of all leaders and 66% of Connected Operations Leaders say **improving workforce productivity with new technologies** is a critical priority for their organisation in 2023.





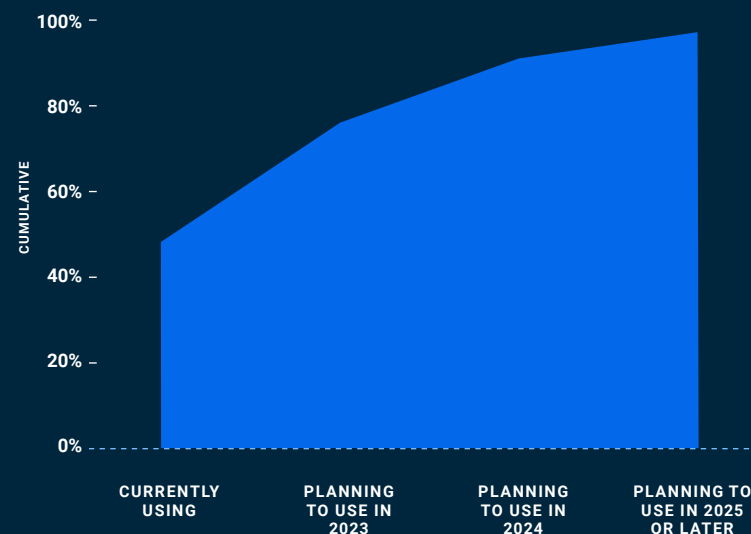
## Leaders are eyeing automation and autonomous vehicles.


Automation is an incredibly broad category of technologies, spanning from automated workflows to automated vehicles and equipment. By 2024, 91% of operations leaders say they will be leveraging automation to modernise their operations. This likely reflects its broadness as a category, but also indicates eagerness among those we surveyed to find ways to increase efficiency through varied applications of automation.

### When are leaders planning to adopt autonomous technologies?

- **42% said testing or adopting autonomous technology is a critical priority** for their organisation in 2023.
- **51% are already using or plan to use autonomous vehicles and/or equipment** in 2023, and leaders predict that by the end of the decade, autonomous vehicles and/or equipment will be widely adopted throughout their organisations.

By 2024, **91% of leaders plan to leverage automation** to modernise their operations.





“These new types of generative AI models are going to be game-changers. Now you’re starting with an already powerful piece of AI technology and then tuning it to a specific use case or problem. These models will evolve quickly to understand businesses and inform decisions that cut costs and optimise operations.”

– EVAN WELBOURNE

*Head of Machine Learning & Computer Vision, Samsara*

## AI is driving innovation.

Generative AI made a splash this year, and adoption is already strong:

- 31% of all leaders and **47% of Connected Operations Leaders are already leveraging generative AI** to modernise their operations.
- 84% of all leaders plan to use generative AI by 2024, while only 5% have no plans to adopt it.

As generative AI technology continues to advance, and its real-world applications multiply – this will unlock enormous possibilities for physical operations over the coming years. In the future, this could include automating driving tasks, predicting consumer demands and streamlining daily tasks.

Leaders will need to cut through the noise and hone in on solutions that leverage the full potential of AI to augment and improve existing processes and solve new problems. For physical operations in particular, AI that can organise and analyse massive amounts of data from sites, vehicles, assets and employees in the field will be especially impactful – helping to reduce manual workload and maximise opportunities for proactive, data-driven action.



Beyond generative AI specifically, applications of AI in general are already transforming physical operations in a multitude of ways, including:



**Speeding up and automating manual processes:** As leaders digitise long-standing pen and paper processes, AI models are learning how to make these processes quicker and more efficient.



**Decreasing crashes and improving safety:** AI-powered cameras can detect safety hazards (such as a person entering a restricted zone) and behaviours (such as distracted driving) to catch risky behaviour early and correct it quickly.



**Analysing and organising siloed data to inform strategic decision-making:** The bigger the organisation, the bigger the data overload. Leaders are harnessing AI to organise and analyse data across their operations to surface high-level insights.



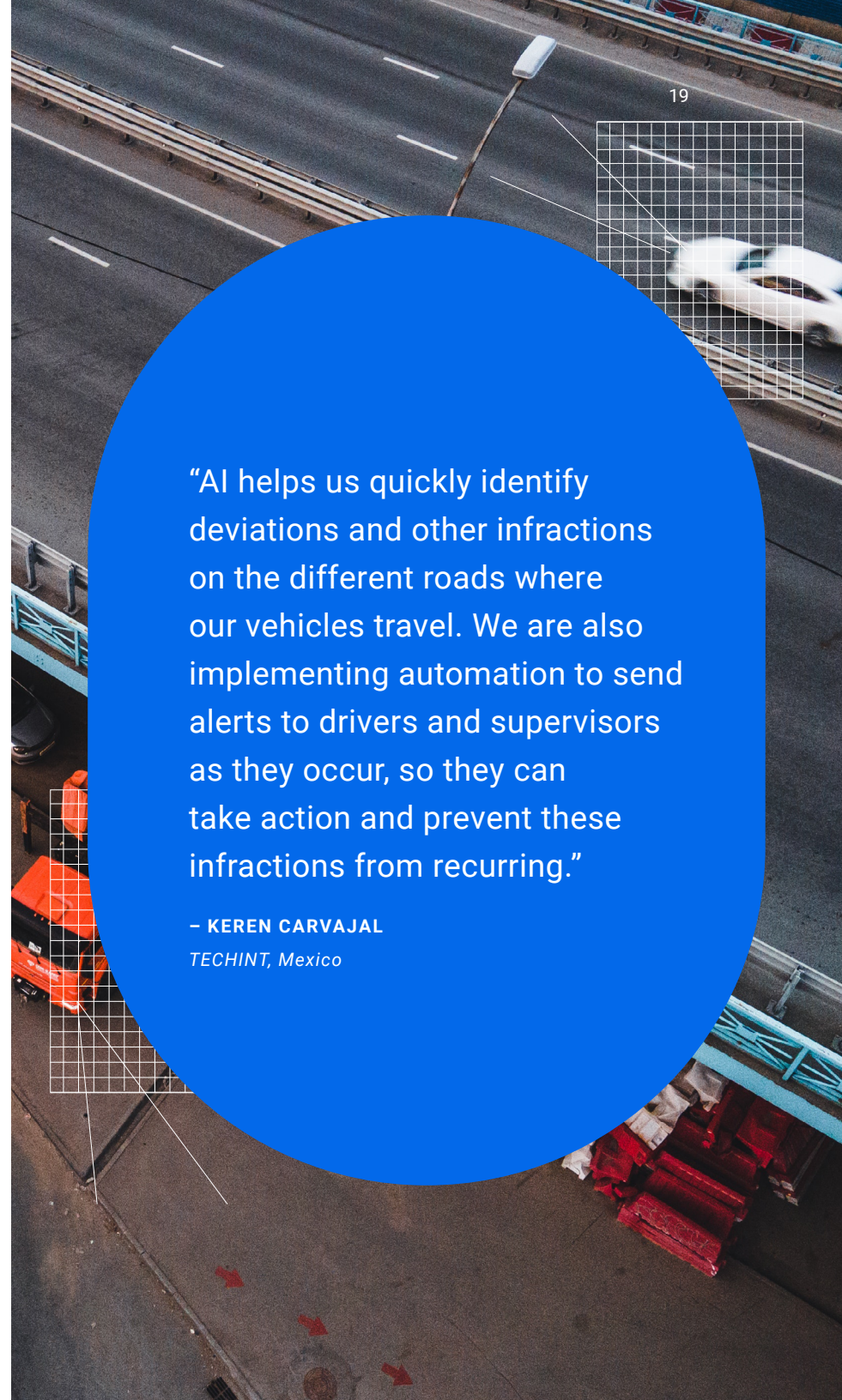
**Improving visibility of physical assets:** AI can detect when physical assets are misplaced or stolen and automatically trigger an alert. These monitoring technologies are drastically improving theft prevention and reducing manual workloads.




**Increasing operational efficiency:** Monitoring individual assets, sites, and details such as vehicle detention time can be a headache, even for small organisations. Many leaders are turning to AI to track and analyse data across their operations, and to make recommendations on how to improve efficiency.

“AI helps us quickly identify deviations and other infractions on the different roads where our vehicles travel. We are also implementing automation to send alerts to drivers and supervisors as they occur, so they can take action and prevent these infractions from recurring.”

– KEREN CARVAJAL  
TECHINT, Mexico







“Technology investments are not only critical to upholding our safety protocols, but they are also essential to how we engage and retain our drivers. We can pinpoint the exact safety milestones our drivers are reaching and reward them in meaningful ways. These technology investments are critical in helping us continuously meet and exceed our safety goals.”

– DERRICK WATERS

*Coach USA, United States and Canada*

## Top workforce priorities hinge on technology.

While automation and AI are reshaping what’s possible – unlocking new types of workflows and jobs, macroeconomic pressures are underscoring the need for efficiency. As a result, leaders are looking for ways to empower their current workforce to increase both productivity and retention.

### What are leaders’ top workforce priorities for 2023?

Technology is at the heart of key workforce initiatives this year:

- **Utilising data and technology to optimise employee productivity is the #1 workforce priority** leaders identified for 2023, with 57% of all leaders reporting this as a priority.
- Similarly, a smaller majority of leaders (52%) said **training, upskilling and reskilling employees to use new technologies** is also a top workforce priority this year.

Recruitment and retention remain critically important, but leaders are looking beyond competitive pay to anticipate the needs of their ever-changing workforce:

- Just under half (49%) of all leaders said **creating a more diverse, equitable and inclusive workplace** is a top workforce priority this year.
- Recognition is also top of mind. 46% of all leaders said **recognising and celebrating employees’ contributions** is a top workforce priority this year.

## Upskilling and reskilling are vital to people-first digital transformation.

In just two years, by 2025, 1 in 6 operations employees are predicted to be doing jobs that don't exist today, indicating how quickly technologies such as automation and AI are shaping the future workforce.

Beyond efforts to increase employee productivity, leaders are going one step further to prepare for this future by investing heavily in workforce development. Leaders plan to spend an average of \$1,091 per employee on training, upskilling, and reskilling in 2023. Across the organisations surveyed, an estimated \$7 billion will be spent on training, upskilling and reskilling employees in 2023 alone.

### What skill gaps are top of mind to address in the next two years?

- 61% of all leaders are planning to invest in **safety knowledge and skills** (such as compliance regulations, health and safety management, safety standards, and safety auditing and training).
- 59% of all leaders are planning to invest in **digital skills** (the ability to use digital devices, applications, and networks to access and manage information).
- 56% of all leaders are planning to invest in **sustainability knowledge and skills** (such as environmental data collection, carbon accounting and regulations).

This reflects how technology is creating opportunities for new roles in physical operations, innovative solutions to address safety, and increased potential for revenue and net-new jobs through safety and sustainability initiatives.

Connected Operations Leaders are investing more in upskilling and reaping the benefits.



### GREATER INVESTMENT

Connected Operations Leaders plan to spend even more on upskilling, an average of **\$1,336 per employee** this year – indicating how organisations that are more digitally mature are ahead of the curve when it comes to supporting employees' career growth.



### HIGHER PRODUCTIVITY

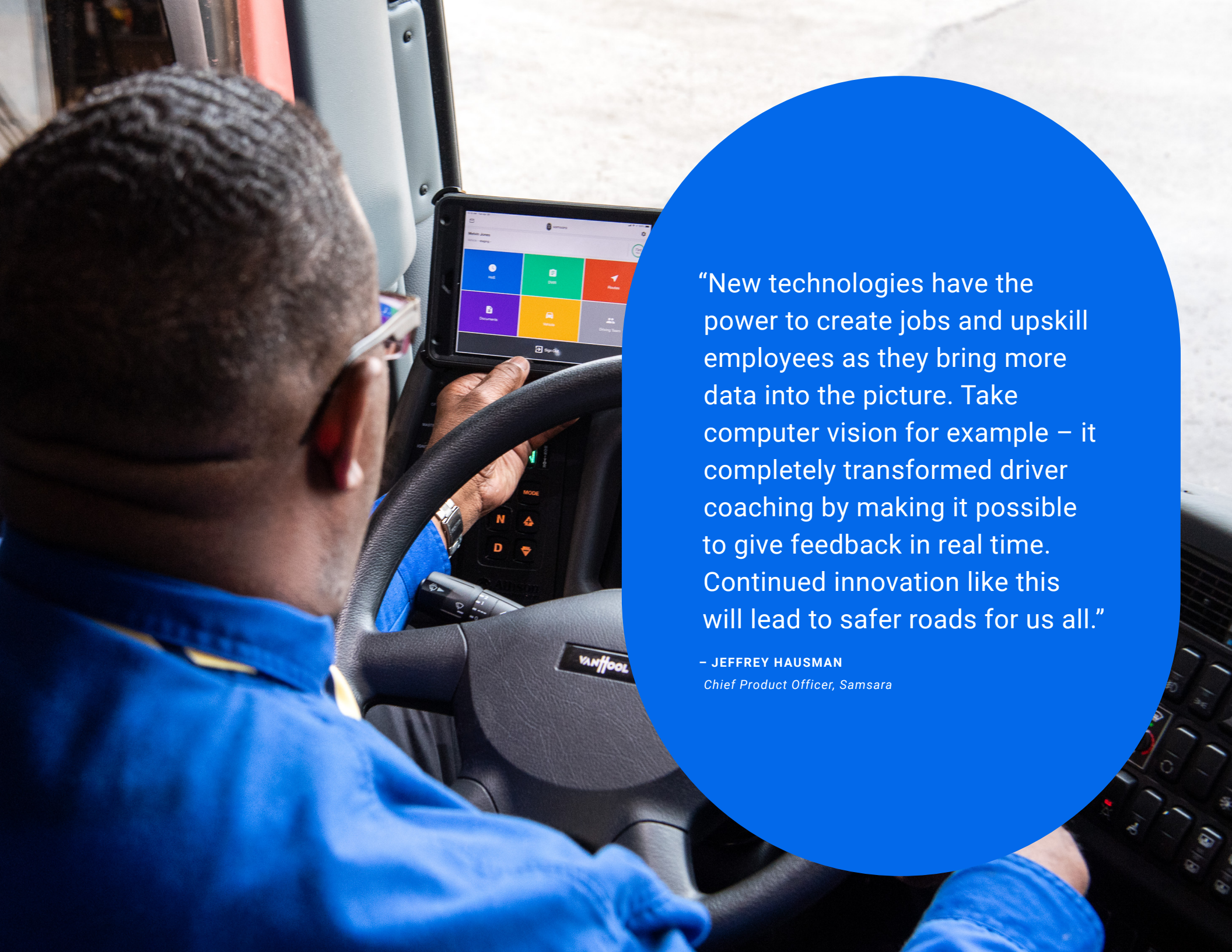
Take note of this difference – Connected Operations Leaders are nearly **5x more likely to rate the productivity of their workforce as “excellent”** compared to those at the beginning of their digitisation journey.



### IMPROVED SAFETY

Furthermore, the value of upskilling and reskilling is clear. 63% of Connected Operations Leaders reported **greater employee safety** was a benefit of their investment in reskilling or upskilling employees.





“New technologies have the power to create jobs and upskill employees as they bring more data into the picture. Take computer vision for example – it completely transformed driver coaching by making it possible to give feedback in real time. Continued innovation like this will lead to safer roads for us all.”

– JEFFREY HAUSMAN

*Chief Product Officer, Samsara*



## Workflows are getting a needed upgrade.

Organisations that manage physical operations have been historically underserved by technology. While other sectors benefited from digital solutions tailored to their needs, physical operations relied on paper documents and manual processes.

Now, as Internet of Things (IoT) technologies have become more affordable and advanced, their applications to physical operations have multiplied – and leaders are capitalising on this moment:

- **Digital workflows that guide employees through day-to-day tasks are the #1 priority** leaders identified for upskilling and reskilling employees in the next two years.
- In fact, leaders predict that **by 2025, 55% of employees in the field will rely on digital workflows** to perform day-to-day tasks.
- This digitisation drive isn't limited to digital workflows. In the next two years, **62% of organisations will use AI to coach employees in real time**, and 58% will use extended reality.

These technologies are intended to streamline existing processes and workflows, and organisations that adopt these solutions early may find that adapting to these new digital environments sooner rather than later gives them a competitive advantage.

Leaders see digital, personalised technologies as **key to upskilling employees** in the next two years.

**65%** Will use digital workflows that guide employees through their day-to-day tasks.

**62%** Will use AI to coach employees in real time.

**58%** Will use extended reality (augmented reality and/or virtual reality).


**45%** Will use nano-learning platforms (bite-sized lessons where and when they are needed).



### RETENTION SPOTLIGHT

56% of Connected Operations Leaders report increased employee retention as a benefit of upskilling and reskilling employees.





“The impact of Mohawk’s technology initiatives has been significant, leading to improved customer service, increased driver morale, and the establishment of a strong foundation for future growth and innovation. These positive results have not only had a direct impact on the company’s results, but they have also created a culture of innovation and progress within the organisation.”

– SHANE FAULKNER

*Mohawk Industries, United States*



# 03

**Sustainability is fuelling the invention of new revenue streams. Leaders are adopting early and monetising.**

Sustainability initiatives are cutting emissions and adding new revenue streams, indicating that it can literally pay to go green.





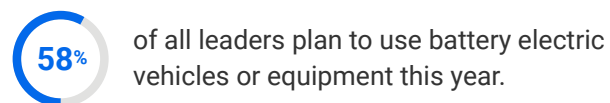


**Sustainability is  
fuelling innovation.**

## Top trends you need to know.

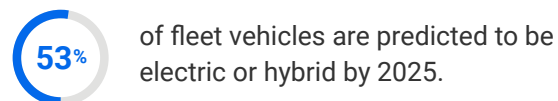
### IN 2023

**Clean fuel is the rule, not the exception.**

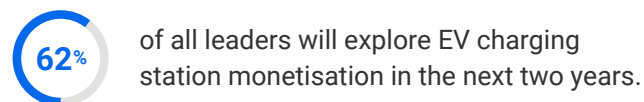


### BY 2025

**Electrification is no longer a matter of if, but when.**



**EVs are unlocking new revenue streams.**



## Decarbonisation is reshaping physical operations.

Regulators around the world are cracking down on businesses that aren't making moves in a sustainable direction. **51% of Connected Operations Leaders said regulatory requirements are a primary driver for reducing emissions.**

Interest in government sustainability grants is high across all countries, with Mexico standing above the crowd, where 60% of leaders plan to pursue these grants in the next two years. **Globally, 62% of Connected Operations Leaders plan to pursue government sustainability grants, compared to 50% of those at the beginning of their digitisation journey.**

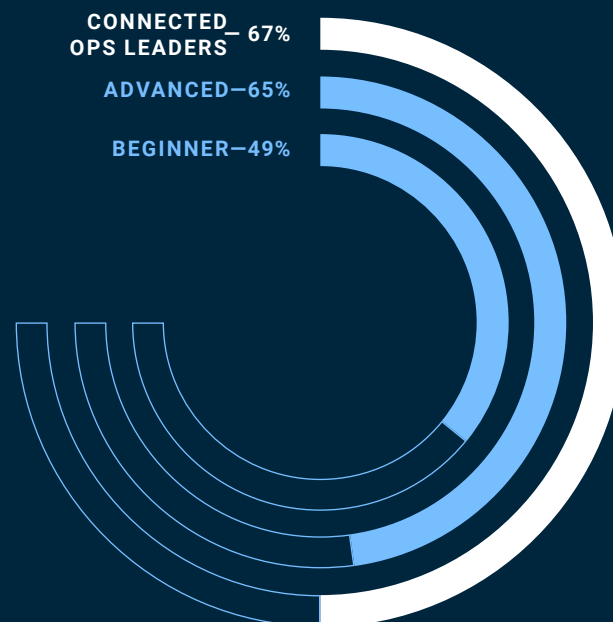
### What's exciting leaders about decarbonisation efforts?

- Leaders cite “meeting customer and/or partner expectations” and “increasing competitiveness” as primary drivers for reducing emissions, indicating how market pressures are shifting.
- In general, reducing emissions is a high priority for 2023; top strategies include purchasing or leasing electric vehicles (EVs), training drivers to reduce fuel usage and idling, and optimising routing to reduce miles driven.

#### SUSTAINABILITY SPOTLIGHT

51% of Connected Operations Leaders said a primary driver for reducing carbon emissions is to improve employee retention and recruitment.

Battery electric is the future: **67% of Connected Operations Leaders** will use battery electric vehicles or equipment in 2023.





### Clean and sustainable fuel use globally:


Interest in biodiesel is 26% higher in France and 22% higher in Germany compared to the global average.

● #1 PRIORITY    ● #2 PRIORITY    ○ SIGNIFICANTLY HIGHER THAN GLOBAL AVERAGE

	BENELUX	FRANCE	GERMANY	MEXICO	UK & IRELAND	US
BATTERY ELECTRIC	●	○	●	●	○	○
NATURAL GAS	○	○	○	●	●	○
BIODIESEL / RENEWABLE DIESEL	○	○	○	○	○	○
RENEWABLE NATURAL GAS	●	○	○	○	○	○
HYDROGEN FUEL CELLS	○	○	○	○	○	○
SOLAR	○	○	○	○	○	○





A photograph of a man with a beard and short hair, wearing a dark blue long-sleeved shirt, driving a car. He is looking out the window to his right. A large, dark blue circular overlay is positioned on the right side of the image, containing white text. The background shows the interior of the car, including the dashboard and a rearview mirror with a small camera attached to it.

“When you’re driving from job to job, under pressure to arrive on time, thinking about the environment might be the last thing on your mind. But how fast we drive, how hard we brake – every little decision has a big impact. That’s why I try to make a difference where I can. I moved out of the city to be in a better, cleaner environment for my young son. So when people ask me why I’m making such a conscious effort to reduce my emissions, my answer is simple: I do it for him.”

– DAVID DAILLY

*Morrison Energy Services (Contract for M Group),  
United Kingdom*



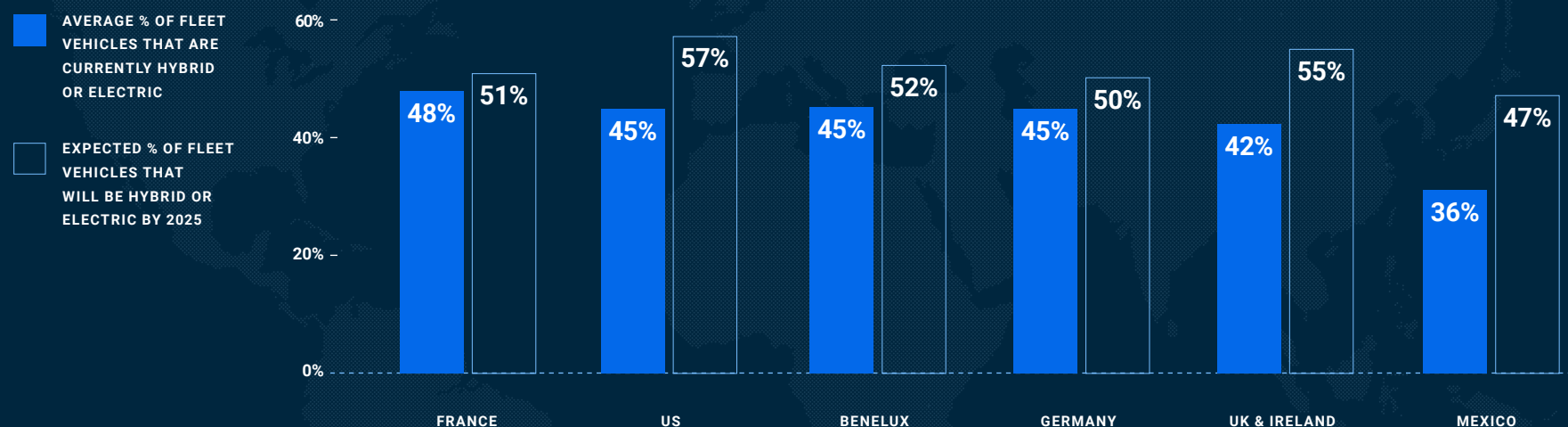
## Electric and hybrid vehicles are becoming the norm.

Electric and hybrid vehicle adoption is on the rise, with no sign of slowing down. Nearly all leaders (87%) report that their fleet is already at least 20% electric or hybrid – and the majority (58%) predict their fleet will be at least 50% electric or hybrid in just two years, by 2025. Additionally, 50% of organisations plan to purchase or lease EVs in 2023 in order to reduce emissions.

Currently, France has the highest electric and hybrid vehicle saturation, where leaders report an average of 48% of their fleet is electric or hybrid. Mexico has the lowest current saturation, where leaders report an average of 36% of their fleet is electric or hybrid.

While the current saturation of electric and hybrid vehicles around the world differs, the major hurdles to electrifying fleets today are similar globally: fast-charging station availability (50%), battery range (48%) and overall EV availability (48%).

France is currently leading the way in electric and hybrid vehicle adoption, but the US, UK and Ireland will electrify aggressively in the next two years.





“Sobeys already successfully performed a study to replace 10 diesel vehicles in the fleet with Class 8 EVs and plans to achieve a significant fuel and emission reduction as a result. As a company, we would like to reduce fuel consumption and emissions across the board both for the fleet and our infrastructure. We are currently looking to add more EVs as soon as possible.”

– LEVENTE SZABO

*Sobeys, Canada*



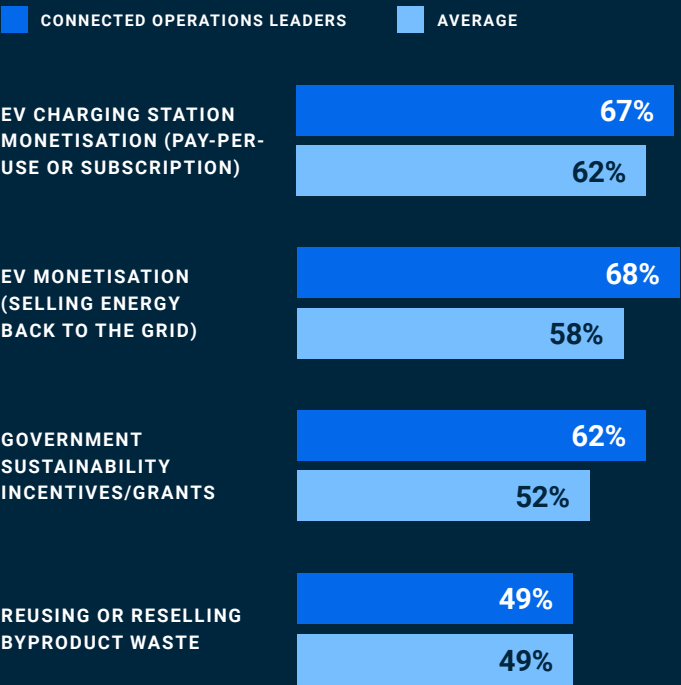
# Sustainability is good for the world and good for business.

Investments in sustainability are leading to the invention of new, and more profitable operating models. One of the most notable emerging trends in the EV landscape is the creation of new revenue streams. In fact, only 2% of organisations said they have no plans to pursue new sustainability-related revenue streams in the next two years.

## What monetisation opportunities are leaders pursuing in the next two years?

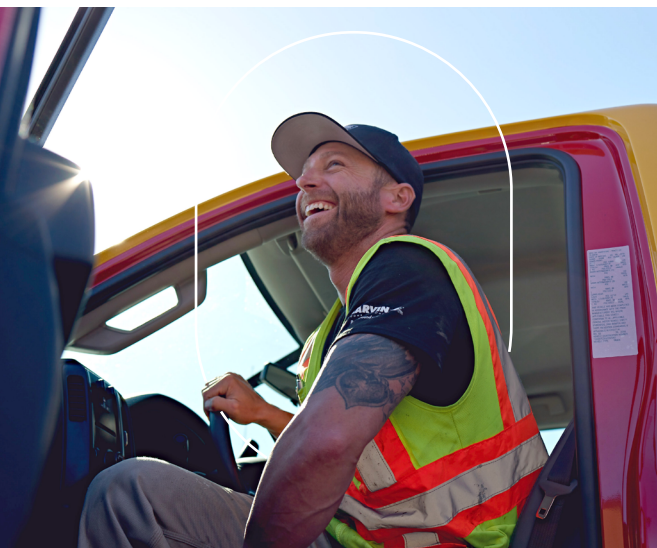
- 62% will pursue **EV charging station monetisation** through pay-per-use or subscription charging. Leaders in Benelux are particularly interested in EV charging station monetisation, with 72% of leaders in the region expressing interest in the next two years.
- 58% will pursue **EV monetisation** by selling energy back to the grid.
- 52% will pursue **government sustainability incentives** or grants.
- 49% will pursue **reusing or reselling byproduct waste**.

Connected Operations Leaders are **more likely to pursue new sustainability-related revenue streams** than average.



# 5 Ways to Transform Your Operations in 2023

Ready to turn insights into action? Let data lead the way and harness the collective wisdom of Connected Operations Leaders around the world to take your strategy to the next level.



## Invest, don't rest.

Action-oriented leaders capitalise on times of change to re-imagine their operations. Where there is challenge there is also opportunity; use this moment to invest in technology and data strategically, and you can turn uncertain realities into a more certain future.

## Re-imagine recruitment and retention.

Bonuses and perks are no longer enough to attract top talent. Investing in training, technology and even sustainability is necessary to find and keep the best people. Examine your recruitment and retention strategies, and explore untapped ways to level-up your employee experience.

## Electrify early for untapped revenue.

Investments in sustainability are unlocking previously untapped revenue streams – particularly for organisations that double down on EV adoption and monetisation early. If you want to make sustainability goals work for you this year (and not just work to achieve those goals), investigate the revenue streams EVs could offer.

## Try new tech.

Looking for a sign to take that new technology solution for a test drive? Leaders around the world are already piloting autonomous vehicles and equipment, leveraging AI to boost efficiency and exploring the potential of generative AI – saving money, boosting productivity and reducing emissions in the process. In 2023, don't be afraid to finally take the leap and try something new. If you don't, you may fall behind.

## Digitise to optimise.

The future is here and it is connected. The efficiency and bottom-line benefits of digital transformation are immense, and leaders around the world are embracing solutions that not only connect their existing tech stack, but their workforce as well. Look for processes where paper is still used – make it digital, and see firsthand how the benefits of digitisation can compound.



## How are leaders across the world transforming their operations?

This year, we asked the 1,500+ leaders we surveyed globally: *How is your organisation transforming its operations in 2023?* Here are some of the most interesting and insightful responses we received.

**“Adapting AI tools, by which data can be both processed and analysed in incredibly large amounts to make service more effective and increase profit.”**

– Vice President of a United Kingdom telecommunications company with 500 to 999 employees

**“Promoting from within the company by teaching new skills instead of hiring from outside the company. Working to reduce emissions. Increasing fleet size. Adding new types of vehicles to the fleet that would be beneficial.”**

– President or General Manager of an American utilities and energy company with 1,000 to 4,999 employees

**“Autonomous vehicles will be able to take over some of the more mundane tasks of fleet management, such as route planning, fuel management and vehicle maintenance.”**

– President or General Manager of a Belgium logistics company with 5,000 to 9,999 employees

**“Promote low-carbon, environmentally friendly operating practices. Choose advanced technologies for transportation operations using electric or biodiesel vehicles.”**

– Vice President of a Mexican building and facility management company with 500 to 999 employees

**“Businesses will need to focus more on sustainability and environmental protection, which means their operations will need to be more efficient and waste-focused.”**

– Director of a French construction company with 5,000 to 9,999 employees

**“Improving supply chain management through better logistics and inventory control, and adopting agile methodologies for faster decision-making and more responsive operations.”**

– President or General Manager of a German building and facility management company with 500 to 999 employees

## About Samsara

Samsara is the pioneer of the Connected Operations™ Cloud, which is a platform that enables organisations that depend on physical operations to harness Internet of Things (IoT) data to develop actionable insights and improve their operations. Samsara operates in North America and Europe and serves tens of thousands of customers across a wide range of industries. The company's mission is to increase the safety, efficiency and sustainability of the operations that power the global economy.



**~6T**  
data points  
processed



**110M+**  
AI-based safety  
events detected



**40B+**  
miles driven



**50B+**  
API calls

*Data from FY23*







## Methodology

The 2023 State of Connected Operations survey was conducted by an independent research firm, Lawless Research, between 6 February and 10 March 2023. 1,525 operations leaders were surveyed across nine countries: Belgium, France, Germany, Ireland, Luxembourg, Mexico, the Netherlands, the United Kingdom and the United States. This survey was 10 minutes long and conducted online, in either the English language or translated into a local language across markets. Global results have been aggregated across all responses to provide an average.

The respondents were full-time employees in organisations with 500 or more employees, and 150 or more fleet vehicles, powered assets and/or unpowered assets. All were directors and above who:

- Have responsibility for compliance, field service management, fleet management, health and safety, IT, technology, or data, logistics, maintenance, operations, security, service operations, and/or sustainability and environment.
- Are decision-makers for choosing technology for physical/fleet operations.

*The information provided in this report is for general informational purposes only. Samsara does not guarantee you will achieve any specific results if you follow any advice in the report. It may be advisable for you to consult with a professional such as a lawyer, accountant, architect, business advisor, or professional engineer to get specific advice that applies to your specific situation.*



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