



australasian supply chain institute
Professionalising Supply Chain Management

The State of Supply Chain Management

Introduction

The State of Supply Chain Management measures the pulse of Supply Chain Management in Australia.

Through this study, we will explore eight components to provide insight into the maturity of the supply chain function:

- 1. Collaboration**
- 2. Technology and Automation**
- 3. Integration**
- 4. Compliance and Regulation**
- 5. Logistics and Distribution**
- 6. Risk Management**
- 7. Sustainability**
- 8. Procurement**

You can complete this survey in several sessions, so long as you use the same device. It will take approximately 15 minutes. You will be the first to receive the report, which will include a longitudinal analysis from previous years and a great way to benchmark your own supply chain practices.

Together, we look forward to sharing the results and insights with you.

ASCI Research



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Participant Summary

*** 1. Indicate your job title:**

- Senior Manager (CEO/CFO/CIO/CSO/VP/GM/Director) Functional Manager
- Department Manager
- Other (please specify)

*** 2. Indicate your key areas of responsibility in relation to supply chain. Select all that apply.**

- | | |
|--|---|
| <input type="checkbox"/> Supply Chain | <input type="checkbox"/> Sales, Marketing or Demand |
| <input type="checkbox"/> Planning and Scheduling | <input type="checkbox"/> Customer Service |
| <input type="checkbox"/> Inventory | <input type="checkbox"/> Finance and Accounting |
| <input type="checkbox"/> Logistics | <input type="checkbox"/> Shipping and Receiving |
| <input type="checkbox"/> Transport | <input type="checkbox"/> Human Resources |
| <input type="checkbox"/> Procurement or Supply | <input type="checkbox"/> Information Technology |
| <input type="checkbox"/> Operations | |
| <input type="checkbox"/> Other (please specify) | |

* 3. Indicate the key industry sector for your organisation:

- | | |
|--|---|
| <input type="radio"/> Agri-food | <input type="radio"/> Life Sciences (Pharmaceutical) |
| <input type="radio"/> Aerospace and Defence | <input type="radio"/> Media |
| <input type="radio"/> Automotive | <input type="radio"/> Mining and Resources |
| <input type="radio"/> Finance, Banking and Insurance | <input type="radio"/> Professional Services |
| <input type="radio"/> Chemicals, Petroleum, Oil and Gas | <input type="radio"/> Public Sector (Governments, NGOs) |
| <input type="radio"/> Consumer Goods | <input type="radio"/> Retail and Wholesale |
| <input type="radio"/> Defence | <input type="radio"/> Sports and Entertainment |
| <input type="radio"/> Education | <input type="radio"/> Telecommunications |
| <input type="radio"/> Engineering and Construction | <input type="radio"/> Transport (Road, Rail, Sea and Air) |
| <input type="radio"/> Healthcare | <input type="radio"/> Logistics Services |
| <input type="radio"/> High Technology Manufacturing, Systems and Solutions | <input type="radio"/> Tourism |
| <input type="radio"/> Industrial Machinery, Parts and Components | <input type="radio"/> Utilities |
| <input type="radio"/> Other (please specify) | |

4. How many full-time equivalent employees does your organisation employ?

5. How many years has your organisation been in operation?

6. What was your organisation's annual turnover last financial year as at 30 June 2019? (If your currency is not in AUD please estimate or convert)

- | | |
|---|---|
| <input type="radio"/> Under \$10m AUD | <input type="radio"/> Between \$36m and \$100m AUD |
| <input type="radio"/> Between \$10m and \$20m AUD | <input type="radio"/> Between \$100m and \$500m AUD |
| <input type="radio"/> Between \$20m and \$36m AUD | <input type="radio"/> Over \$500m AUD |

7. How would you describe the geographical scale of your organisation?

- National
- Global

8. Where is your organisation's head office located?



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Collaboration

* 9. Is your production plan integrated with other plans such as marketing, sales, inventory and distribution?

Yes

Currently being developed

No

* 10. What motives have underpinned your organisation's formal and informal collaborations with other organisations? (Select all that apply)

Sharing costs

Acquiring missing knowledge

Accessing tacit knowledge and expertise in the organisation

Utilising complementary resources

Sharing risk related to development of new technology

Regulatory and compliance pressure techniques

Other (please specify)

11. How would you rate the outcome of collaboration with the following parties in helping to grow your supply chain?

	Positively	Neutrally	Negatively	N/A
Consumers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other divisions within your organisation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Second/third tier suppliers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competitors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government, Agencies, Standards Authorities, Universities and Research institutes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12. How would you rate the importance of the following practices in your organisation.

	Low	Medium	High	Very high	N/A
Customer segmentation	<input type="radio"/>				
Service requirements	<input type="radio"/>				
Profitability	<input type="radio"/>				
Demand planning	<input type="radio"/>				
Product differentiation	<input type="radio"/>				
Supply sources to reduce ownership of materials	<input type="radio"/>				
Multi-level decision making	<input type="radio"/>				
Channel spanning performance measures	<input type="radio"/>				

13. Please indicate the level of collaboration that exists in your organisation between third party suppliers, competitors and end customers. (Estimate only)

0 Low 10 High



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Technology and Automation

* 14. Which of the following have you currently implemented within your supply chain? (Select all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Advanced analytics | <input type="checkbox"/> Blockchain |
| <input type="checkbox"/> Mobile applications | <input type="checkbox"/> Artificial intelligence |
| <input type="checkbox"/> Cloud-based applications | <input type="checkbox"/> Internet of things (IOT) |
| <input type="checkbox"/> Radio-frequency identification (RFID) | <input type="checkbox"/> Big data |
| <input type="checkbox"/> Machine learning | <input type="checkbox"/> Augmented reality |
| <input type="checkbox"/> 3D Printing | <input type="checkbox"/> Virtual reality |
| <input type="checkbox"/> Automation and robotics | <input type="checkbox"/> Digital twin (a computerised version of a physical asset) |
| <input type="checkbox"/> Sensor technology and driverless vehicles and drones | <input type="checkbox"/> Crowdsourcing |
| <input type="checkbox"/> Automatic identification | <input type="checkbox"/> None of the above |
| <input type="checkbox"/> Other (please list) | |

* 15. Which of the following do you intend to start implementing over the next 12 months? (Select all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Advanced analytics | <input type="checkbox"/> Blockchain |
| <input type="checkbox"/> Mobile applications | <input type="checkbox"/> Artificial intelligence |
| <input type="checkbox"/> Cloud-based applications | <input type="checkbox"/> Internet of things (IOT) |
| <input type="checkbox"/> Radio-frequency identification (RFID) | <input type="checkbox"/> Big data |
| <input type="checkbox"/> Machine learning | <input type="checkbox"/> Augmented reality |
| <input type="checkbox"/> 3D Printing | <input type="checkbox"/> Virtual reality |
| <input type="checkbox"/> Automation and robotics | <input type="checkbox"/> Digital twin (a computerised version of a physical asset) |
| <input type="checkbox"/> Sensor technology and driverless vehicles and drones | <input type="checkbox"/> Crowdsourcing |
| <input type="checkbox"/> Automatic identification | <input type="checkbox"/> None of the above |
| <input type="checkbox"/> Other (please list) | |

* 16. Which statement best reflects your organisation's overall current supply chain digitisation status?

- We have a holistic digitisation strategy
 We are developing a digitisation strategy
 We have a piecemeal digitisation strategy
 No real digitisation strategy

* 17. Please indicate the level of automation in your organisation. (Estimate only)

0 Low 10 High

18. Where is technology expected to have the greatest impact to your organisation?

	Considerable impact	Impact	Some impact
Predictive analytics and lead indicator analysis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Process optimisation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cost reduction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Create new business opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competitive advantage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Better targeted marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Product customisation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reducing stock and wastage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reduce inefficiencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Replacement of manual tasks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve productivity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve supply chain collaboration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

19. What activities are currently being undertaken to prepare for new technology?

- Hiring of new staff
 Upskilling internally – training, research and development
 Informal ad hoc research
 Establishing partnership with specialists
 Formal research and investigation – white papers or industry reports
 Contracting out development and implementation
 No investment
 Other (please specify)

20. What are the biggest concerns of emerging technologies to your organisation?

	Considerable concern	Concern	Some concern
Security and hacking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Loss of jobs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Societal changes - gap between rich and poor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ensuring technological uptime	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investments in new technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Operating costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Return on Investment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

21. Please indicate the extent to which your organisation uses analytics to maximise the value of information in the organisation. (Estimate only)

0 Low 10 High



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Integration

* 22. Select the statement that best describes the breadth of your organisation's integration of information?

- Information flows from supplier to our organisation and through to customers
- Information is reconfigured each time between supplier, our organisation, and our customers
- Information flows from supplier to our organisation but is reconfigured for delivery to customers
- None of these
- Information is received from supplier, reconfigured to our organisation and flows directly to customers

23. What business benefits do you feel you would be able to better address through improved integration of business information?

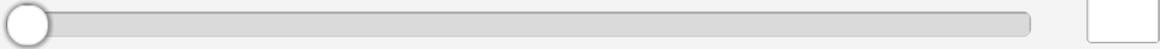
- Increased cost competitiveness. Organisations are looking to reduce costs by improving the synergy and efficiency within their supply chain.
- Higher overall quality. Increasing customer expectations and tougher competition is leading to an increase in quality.
- Shorter product life cycles. As technology advances and there is an increase in competition many products are experiencing shorter life cycles.
- Reduced costs - lower inventory in the supply chain less expedited freight.
- Faster product development cycles. Introducing new products at the start of the product life cycle is often rewarded with an increased market share which helps increase return on investment.
- Globalisation and customisation of product offerings. Consumers are demanding more customised products and now have access to these globally.
- Other (please specify)
- None of the above

24. What do you feel would restrict you from fully integrating business information? (Select top 3)

- Risks of production stoppages
- Time required for training, managing and supporting the integration activities
- Investment in supply chain integration software and other required information systems
- Other activities will be forfeited or delayed from undertaking this activity
- Fear of too close relationships, difficult to exit

* 25. Please indicate the level of information integration across departments, offices and global locations within your organisation. (Estimate only)

0 Low 10 High



26. What are the barriers of supply chain integration to your organisation? (Select all that apply)

- Lack of management skills
- Negative attitude towards change
- Poor knowledge management
- Risk of information sharing, privacy across organisations
- Lack of experience in information sharing
- Multiple independent information systems
- IT supports only some departments
- Other (please specify)
- Lack of willingness to invest in supply chain improvement
- Unable to invest in supply chain improvement
- Lack of staff training
- Lack of top management support
- Strategic misalignment
- Geographical dispersion



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Compliance and Regulation

27. Which areas do you believe are of highest concern when looking to ensure that you are compliant and meet regulatory requirements?

	Low concern	Medium concern	High concern	N/A
Health and Safety	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Violations against environmental regulations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conflicts of interest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Falsifying documents and records	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Not delivering goods and services that live up to customers' expectations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Deliberately miss-communicating function and features of product or service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Multiple levels/tiers of subcontractors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

* 28. Please indicate to what extent you believe that your organisation adheres to full compliance and regulations (Estimate only)

0 Low 10 High

29. Which of the following information does your organisation collect from its suppliers?

- Materials content
- Regulatory status
- Non-regulatory status
- Materials origin
- Greenhouse gases
- None
- Other (please specify)

30. Which regulation/s must you and your suppliers follow?



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Logistics & Distribution

31. What are the most important factors for selecting a 3PL/4PL?

- | | |
|--|---|
| <input type="checkbox"/> Lowest cost | <input type="checkbox"/> Globalisation |
| <input type="checkbox"/> Product tracking and visibility | <input type="checkbox"/> Reduced asset base |
| <input type="checkbox"/> Shortest delivery time | <input type="checkbox"/> Freight forwarding |
| <input type="checkbox"/> Ability to provide insightful data on product (temperature, time sitting) | <input type="checkbox"/> Customs clearance |
| <input type="checkbox"/> Guaranteed delivery date and time | <input type="checkbox"/> Import and export management |
| <input type="checkbox"/> Providing good customer service | <input type="checkbox"/> Domestic transportation |
| <input type="checkbox"/> Seamless cross idle processing | <input type="checkbox"/> International transportation |

* 32. How do you see 3PL/4PL providers being able to assist in helping you transform your supply chain?

Select all that apply.

- | | |
|--|--|
| <input type="checkbox"/> Provide real time data and analytics | <input type="checkbox"/> Reduce costs |
| <input type="checkbox"/> Provide industry knowledge and insights into best practices | <input type="checkbox"/> Reduce complexity |
| <input type="checkbox"/> Supply chain experience | <input type="checkbox"/> Access to markets |
| <input type="checkbox"/> Improved communication and collaboration | |
| <input type="checkbox"/> Other (please specify) | |

33. Where do you see the greatest value being provided to your organisation by a 3PL/4PL provider?

(Select all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Warehouse or distribution centre management | <input type="checkbox"/> Risk reduction |
| <input type="checkbox"/> Planning transportation | <input type="checkbox"/> Global trade management (customs document management) |
| <input type="checkbox"/> Scheduling transport | <input type="checkbox"/> Product visibility |
| <input type="checkbox"/> Web portals for booking and tracking | <input type="checkbox"/> Last mile delivery |
| <input type="checkbox"/> Customer order management | <input type="checkbox"/> Access to new technologies and methods |
| <input type="checkbox"/> Advanced analytics on blockchain | <input type="checkbox"/> Radio-frequency identification (RFID) |
| <input type="checkbox"/> Flexibility of supply chain operation | <input type="checkbox"/> Electronic data interchange (EDI) |
| <input type="checkbox"/> Other (please specify) | |

* 34. To what extent does your organisation utilise their relationships with 3PL service providers in the development of their strategy rather than only seeing them as subcontractors? (Estimate only)

0 Low 10 High

35. What are the information sources used by your organisation to identify 3PL/4PL service providers?

Select all that apply.

- Directories published by professional logistics networks
- Referrals in management magazines and journals
- Advertising from 3PL/4PL providers
- Recommendations from business partners or sister companies
- Referrals from consulting firms
- Recommendations of the organisation's personnel
- Other (please specify)

36. Has the use of 3PL/4PL services changed for your organisation compared to last year?

- Increased
- Decreased
- Stayed the same
- Do not use



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Risk Management

* 37. What activity do you believe you need to undertake to become more flexible, resilient and agile in order to reduce your supply chain risk?

- | | |
|---|---|
| <input type="checkbox"/> Establish and implement a business continuity plan | <input type="checkbox"/> Establish multiple distribution centres |
| <input type="checkbox"/> Develop a dual sourcing strategy | <input type="checkbox"/> Modernise the supply chain through automation |
| <input type="checkbox"/> Develop a hedging or forward buying strategy | <input type="checkbox"/> Improve business visibility through better collection and analysis of data |
| <input type="checkbox"/> Increase inventory levels | |

38. To what extent do you believe that your organisation has a sufficient risk management program to support its supply chain operations? (Estimate only)

0 Low 10 High

* 39. Which of these factors have most negative impact on your organisation's supply chain decision-making? Select all that apply.

- | | |
|---|---|
| <input type="checkbox"/> Lack of information | <input type="checkbox"/> Lack of standardised approaches to decision-making |
| <input type="checkbox"/> Lack of decision-making expertise | <input type="checkbox"/> Inadequate technology systems |
| <input type="checkbox"/> Lack of awareness of risk management | |
| <input type="checkbox"/> Other (please specify) | |

* 40. Which decision has more potential to create risk for supply chain managers? (Select all that apply)

Network planning and optimisation

Product safety

Product design

Warranty and liability

Outsourcing

Compliance

Manufacturing

Other (please specify)

41. What are the risks most likely to cause systemic supply chain disruptions to your organisation? Select all that apply.

Conflicts and political unrest

Corruption

Border delays

Shortage of labour

Market change and demand shifts

Price volatility

Import and Export restrictions

Ownership investment restrictions

Currency fluctuations

Cyber attacks

Illicit trade and organised crime

Terrorism

Piracy

Natural disasters

Information and communication disruptions

42. What methods of risk avoidance and mitigation are used in your organisation? Select all that apply.

- Scenario planning
- Business continuity planning
- Industry benchmarking
- Legislative compliance
- Data and information sharing
- Risk quantification matrix
- Vendor compliance policies
- Supply audit collaboration
- Shaping new legislation
- Government incentive programs
- Professional certification and licensing
- Business-led quality standards
- Track and trace tools
- Insurance
- Training and education
- Risk management program
- Other (please specify)

43. In the past year, what has been the impact of disruption to your supply chain? Select all that apply.

- | | |
|--|--|
| <input type="radio"/> Lesser demand | <input type="radio"/> Longer lead times (delays, queues, backlogs, jams) |
| <input type="radio"/> Greater demand | <input type="radio"/> Lesser container availability |
| <input type="radio"/> Higher logistics costs | <input type="radio"/> More industrial action in Australian ports |
| <input type="radio"/> Higher vigilance for cyber attacks | <input type="radio"/> More visibility of the supply chain |
| <input type="radio"/> More focus on technology in communication | <input type="radio"/> Lesser visibility of the supply chain |
| <input type="radio"/> Lesser sourcing options | <input type="radio"/> Smaller deliveries, more often |
| <input type="radio"/> Fundamental changes in business set up | <input type="radio"/> None of the above |
| <input type="radio"/> Changed ways of working to ensure distancing | |



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Sustainability

44. Does your organisation perform sustainability audits?

- Yes
 No

45. Does your organisation have a sustainability strategy for the supply chain?

- Yes
 No

46. Does your organisation get your suppliers to provide sustainability information?

- Yes
 No

47. Does your organisation's corporate social responsibility (CSR) include measurement of your organisation's performance? Select all that apply.

- | | |
|---|---|
| <input type="checkbox"/> Responsible consumption of resources | <input type="checkbox"/> Air, Noise and Land Pollution |
| <input type="checkbox"/> Waste reduction and recycling | <input type="checkbox"/> Transport emissions processing and manufacturing emissions |
| <input type="checkbox"/> Energy and water consumption | <input type="checkbox"/> Biodiversity |

48. How important are green initiatives to your organisation when considering supply chain vendors and/or purchasing decisions?

- Extremely important
 Somewhat important
 Not very important
 Not at all important

49. What are the most important aspects of a sustainable supply chain for your organisation? Select all that apply.

- Low environmental impact
- Ethics
- Health and safety at work
- Strong financial management

50. Who is driving sustainability in your organisation? Select all that apply.

- Consumers
- Regulators and other authorities
- Corporate leaders or policy
- Non-governmental organisations
- Other (please specify)

51. How do you raise awareness for your organisation's supply chain sustainability? Select all that apply.

- Externally recognised sustainability certificate or label
- Published information about the supply chain
- Advertising through marketing activities
- Other (please specify)

52. Has your organisation's supply chain become more sustainable when compared to last year?

- Higher - more
- Lower = less



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Procurement

53. How does your organisation source the good and services?

- International markets
 Domestic markets

54. Where are the opportunities for your supply chain in the next 12 months? (Select one or more)

	More Opportunities	Fewer Opportunities
China	<input type="checkbox"/>	<input type="checkbox"/>
India	<input type="checkbox"/>	<input type="checkbox"/>
Japan and South Korea	<input type="checkbox"/>	<input type="checkbox"/>
South East Asia	<input type="checkbox"/>	<input type="checkbox"/>
Middle East	<input type="checkbox"/>	<input type="checkbox"/>
UK	<input type="checkbox"/>	<input type="checkbox"/>
European Union	<input type="checkbox"/>	<input type="checkbox"/>
Europe (non EU)	<input type="checkbox"/>	<input type="checkbox"/>
US	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>

55. Does your organisation outsource the procurement services?

- Yes
 No

56. How does the outsourcing procurement organisation source the goods and services?

- International markets
- Domestic markets
- Not applicable

57. What are the key reasons for your firm to outsource procurement to domestic markets? Select all that apply.

- Reputation and brand image
- Less stress on supply chain
- Fast delivery times
- Reduce environment waste
- Reduced cost of logistics
- Reduce communication issues (time zone, language barriers, etc.)
- Not applicable

58. What are the key reasons for your firm to outsource procurement to international markets? Select all that apply.

- Reputation and brand image
- Less stress on supply chain
- Fast delivery times
- Reduce environment waste
- Reduced cost of logistics
- Reduce communication issues (time zone, language barriers, etc.)
- Not applicable



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* 59. I would like a free copy of the report emailed to me

Yes

No

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