

Intelligent Transport Systems UK

State of Industry Survey

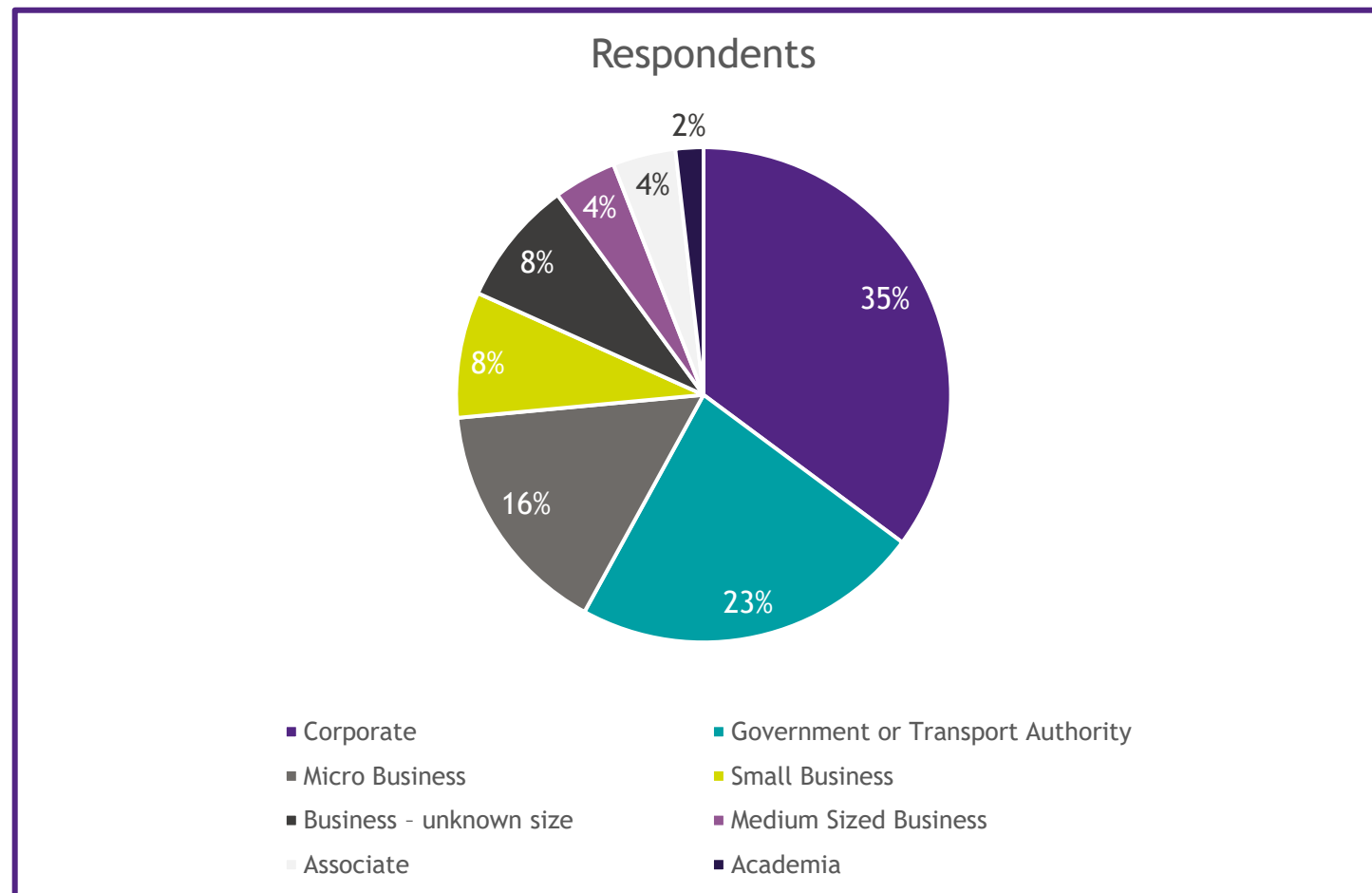
5 January 2026

About

- Independent **survey of transport technology professionals**, conducted by the Pulse Business.
- Four questions:
 - Confidence in future growth of the transport technology sector
 - The biggest barrier to growth for the sector
 - The biggest opportunity for growth for the sector
 - What, if anything is keeping you awake at night
- Polling undertaken between **6 October and 2 December 2025**. Sample size: 4,708 | Response rate: 219



Who responded?

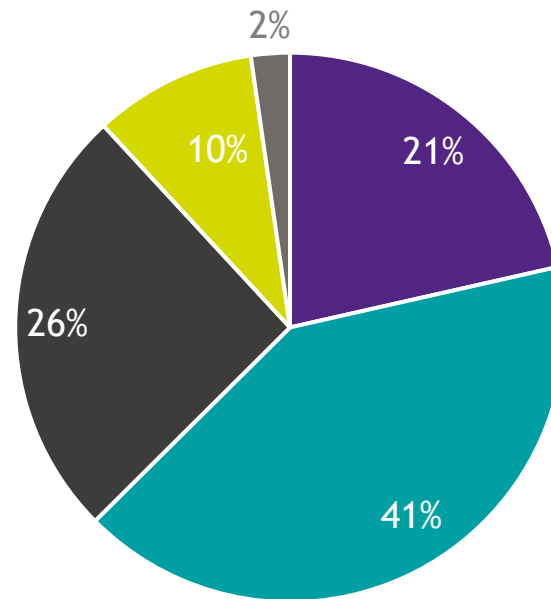


Results

| | |
|-----------------------------------|-----|
| Corporate | 77 |
| Government or Transport Authority | 50 |
| Micro Business | 34 |
| Small Business | 18 |
| Business - unknown size | 18 |
| Medium Sized Business | 9 |
| Membership/Trade Body | 9 |
| Academia | 4 |
| Total | 219 |

1. Confidence

How confident, if at all, are you about the future growth of the transport technology sector in the UK?



■ Really Confident ■ Quite Confident ■ Moderately Confident
■ Not that Confident ■ Not at all confident

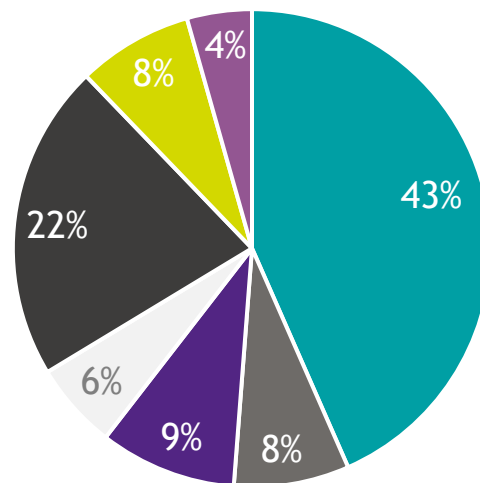
Results

| | |
|----------------------|-----|
| Really Confident | 47 |
| Quite Confident | 90 |
| Moderately Confident | 56 |
| Not that Confident | 21 |
| Not at all confident | 5 |
| Total | 219 |



2. Barriers

What do you believe is the biggest barrier, if any, to the growth of the transport technology sector in the UK over the next 12 months?



- Access to funding & the general economic climate
- Managing different types of procurement processes
- Managing public trust and adoption
- Other
- Regulation & policy uncertainty
- Skills and recruitment
- Transport technology sector fragmentation

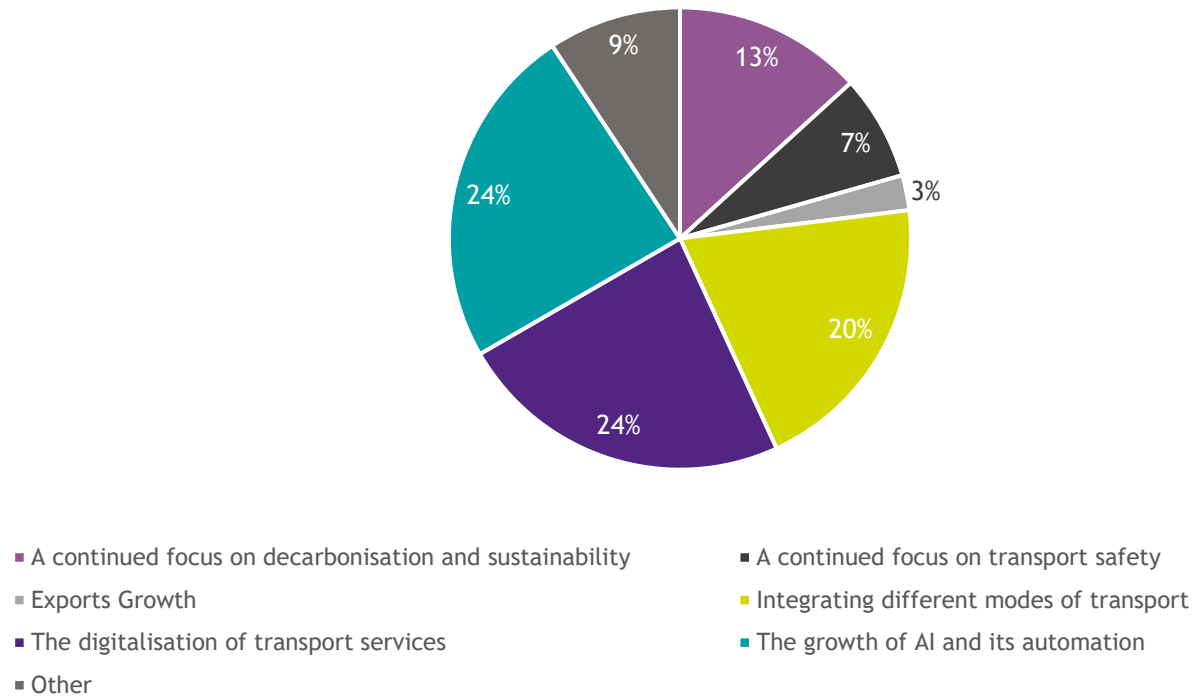
Results

| | |
|---|-----|
| Access to funding & the general economic climate | 89 |
| Managing different types of procurement processes | 16 |
| Managing public trust and adoption | 19 |
| Other | 12 |
| Regulation & policy uncertainty | 44 |
| Skills and recruitment | 16 |
| Transport technology sector fragmentation | 9 |
| Total | 205 |



3. Opportunities

What do you believe is the biggest opportunity, if any, for the growth of the transport technology sector in the UK over the next 12 months?



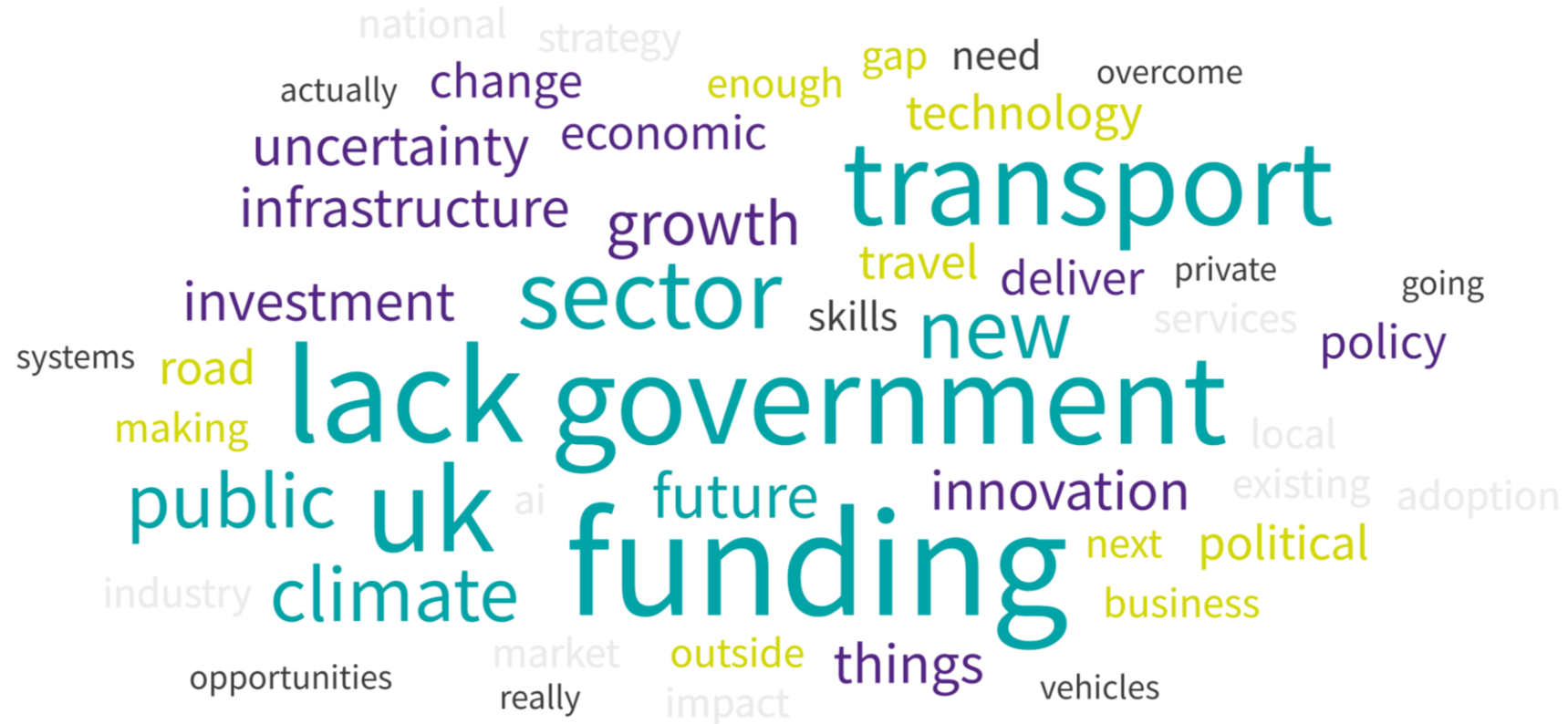
Results

| | |
|---|-----|
| A continued focus on decarbonisation and sustainability | 27 |
| A continued focus on transport safety | 15 |
| Exports Growth | 5 |
| Integrating different modes of transport | 41 |
| The digitalisation of transport services | 48 |
| The growth of AI and its automation | 49 |
| Other | 19 |
| Total | 204 |



4. Keeping you awake

What one thing, if any, is keeping you awake at night right now?



Some interesting findings...

- **The private sector is more confident of growth than the public sector.** 10% of public bodies said they were 'really confident', compared to 23% of businesses. And 65% of businesses said they were either 'really' or 'quite' confident, compared to 58% of the public sector.
- **Larger businesses were slightly more confident of growth.** 69% of corporate and medium sized businesses were either 'really' or 'quite' confident compared to 62% of small and micro businesses.
- **Funding remains the biggest issue.** Across public sector (39%), large and medium sized businesses (48%) and small and micro businesses (49%) 'access to funding & the general economic climate' was seen as the biggest barrier to growth.
- **Public sector focusing on integration whilst businesses look to AI & digitalisation.** When asked the biggest opportunity in the coming year, public sector respondents listed 'integrating different modes of transport' at the top (33%). For the private sector, the growth of AI and automation (27%) and the digitalisation of transport services (23%) ranked highest.



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