

# Case Study: Market & Technology Assessment of IoT in Smart Washrooms

## Client Detail:

- The client is a leading paper product manufacturer based in Finland
- The client is primarily into manufacturing of tissue paper, baking & cooking paper and tailor-made tissue paper
- The client has presence in Germany, Poland, Slovakia and Sweden

## Business Situation:

- The client wanted detailed insights on the development of IoT technology in the smart washroom space and the extent of commercialization of these products in Europe
- The client also sought an in-depth assessment of the various technologies used in hygiene solutions, the activity of its competitors in the washroom space and technology integration required for its smart product offerings

## Assignment:

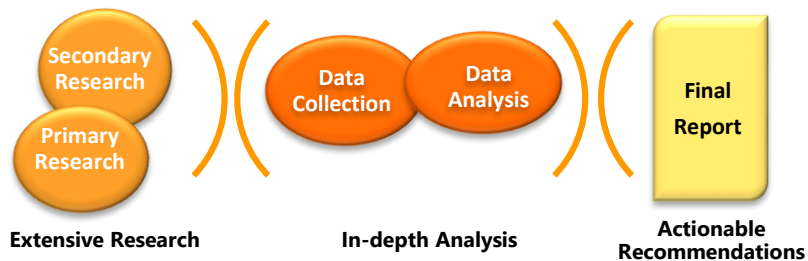
- The client approached Datamatics to gain an in-depth understanding about the development of IoT technology in the smart washroom space in the European market, and the related activities of key competitors
- The client also sought a comprehensive profit pool analysis of the IoT smart washroom value chain

## Datamatics Solution:

- The study included a mix of secondary research and primary interviews with key stakeholders in the value chain
- Datamatics team segregated the study into four phases:
  - **Phase I:** Overview of IoT in smart washroom market backed with in-depth analysis of the current technological scenario through secondary research
  - **Phase II:** Analysis of patents filed and segmented by application, technology, etc. was conducted through secondary research on patent databases. Primary interviews were conducted to analyze the commercial viability of major technologies
  - **Phase III:** A detailed assessment of the competitive landscape of IoT in smart washroom space was provided, along with benchmarking of the relevant products
  - **Phase IV:** Key conclusions and insights were given based on findings of previous modules and Datamatics analysis

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## Methodology:



## Approach:

- The project initiated with in-depth secondary research to understand the market with a focus on market trends, IoT technological evolution and its applications in washroom market, along with profiling of leading key players in the smart washroom space
- As the next step, the team conducted detailed surveys among the smart product manufacturers, facility management service providers, technology companies and industry experts

## Study Outcome:

- The study helped in identifying which smart products were having a high demand in the European market
- Datamatics also provided a profit pool analysis to the client, thereby helping it understand which stakeholders have a higher earning potential

## Project Plan:

- Datamatics identified the universe of players operating in the smart washroom value chain and devised a sample size to adequately capture market feedback

Value Chain Stakeholder	No. of Interviews
Smart Product Manufacturers	14
Facilities Management Service Providers	7
Technology Providers	6
Industry Experts	3
<b>Total</b>	<b>30</b>

## Analysis:

- Competitors were providing end to end solutions in smart washrooms having applications in commercial spaces
- The major companies were forming strategic partnerships with the IoT solution providers or FM companies for increasing their capabilities
- Identification of the top 5 smart washroom product manufacturers