

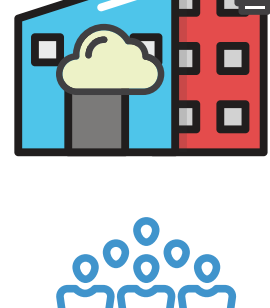


CONNECTED BUILDINGS

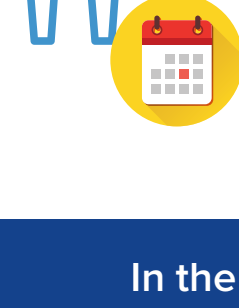
Growing Adoption and Business Value

IDC surveyed 207 IT and operations decision makers across North America to learn about the challenges and opportunities that connected building technology will provide to their organizations. A similar study was conducted in 2018 with 206 respondents.

CONNECTED BUILDINGS ON THE RISE



In 2018, 42% had deployed a connected building solution another 53% were considering it.



In 2020, more than 50% deployed a solution

The remaining building management companies are considering it, with 20% planning to deploy in the next 12 months.

In the last 2 years, there has been a 38% increase in the number of deployments that are now fully operational

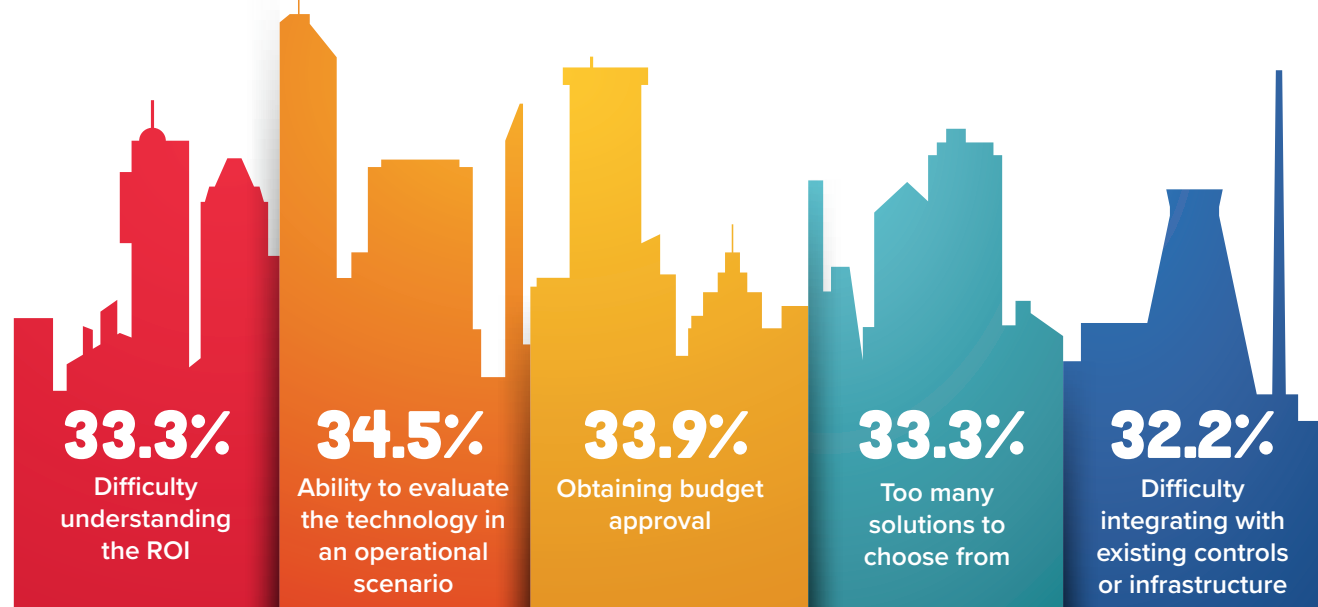
Growing from 39.5% in 2018 to 55% in 2020



Those with active projects and/or are deploying agree they will extend or expand connected building investments in the next 24 months.

TOP 5 CHALLENGES TO SELECTING A CONNECTED BUILDING SOLUTION

In 2020, decision makers deciding to invest in and purchase a connected building solution say they struggle with several issues such as:



In 2018, decision makers making investment decisions struggled with issues such as:



A big shift since 2018 is that organizations understand what functionality they need but now realize the challenges with integrating with existing controls and infrastructure.

TYPES OF CONNECTED BUILDING TECHNOLOGY BEING SELECTED

In 2020, the top connected building capabilities being deployed are:



In 2018, the top capabilities deployed were:



There has been a significant shift in the focus of which technology investments should be made in smart buildings over the last two years.

Comfort and sensing movement/activity are top of mind in 2020, as building managers aim to put more emphasis on putting more experience and the ability to keep count of occupants in spaces due to COVID-19.



From the study data, **lighting** is a top item because it can operate as a standalone system that can later integrate with sensors and beacons and/or larger systems such as HVAC and access control systems.

PATH TO A CONNECTED BUILDING STRATEGY

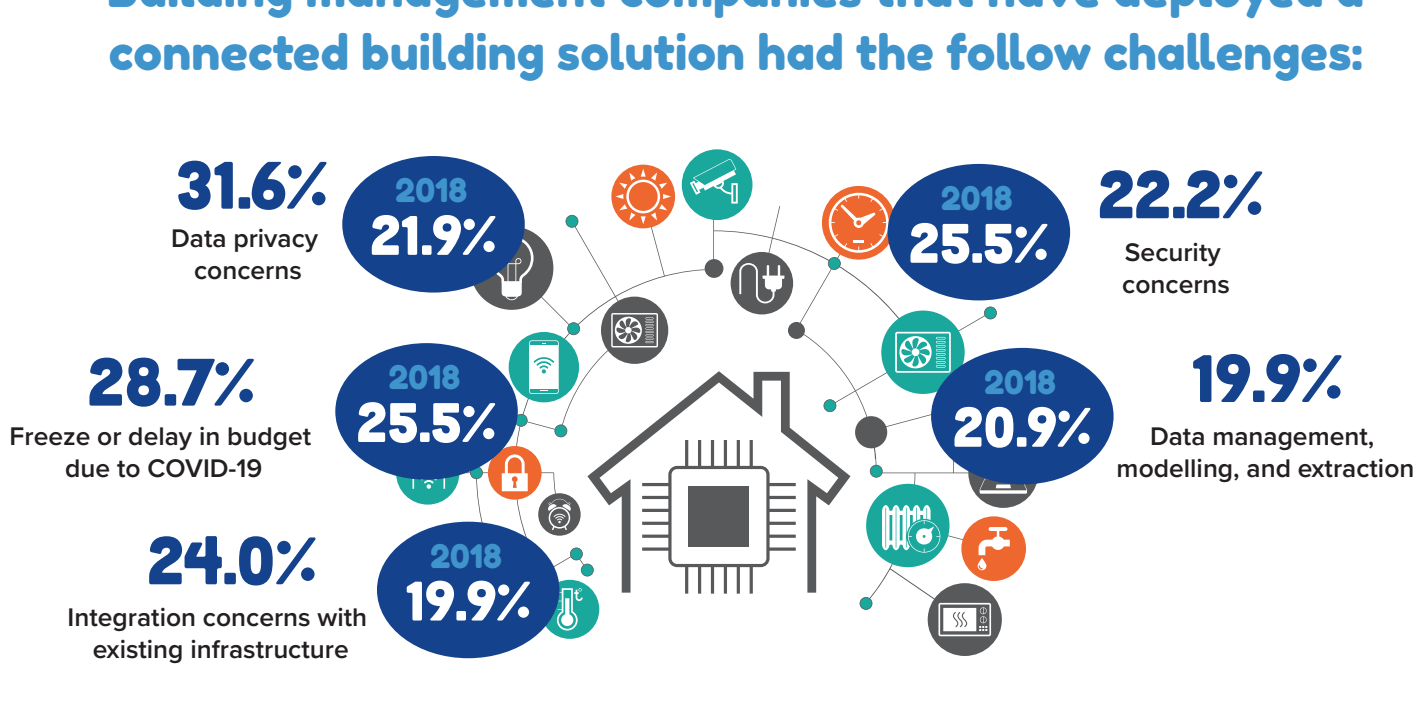
For building management, there is a greater need to differentiate offerings and capabilities that improve customer/ tenant/occupant experience to keep up with increased competition for leased spaces.

Similar priorities: In 2020 & 2018, the following promised outcomes were key drivers to greenlight in connected building investments.



TOP 5 CHALLENGES TO DEPLOYING CONNECTED BUILDING SOLUTIONS:

Building management companies that have deployed a connected building solution had the following challenges:



Over the last two years, data privacy has been a rising concern. However, the current environment, which is dealing with the fallout of COVID-19, is affecting investments.

Again, proving that investments and deployments are more mature in 2020, respondents are turning to how they will **manage and use the data to add value to tenants and their own employees.**



The 2020 study revealed an increasing number of organizations planning to use data from their connected building solution — **more than 90% plan to use the data internally but also make it available to their tenants.**