

2019 Energy Efficiency Indicator Survey

Global Results

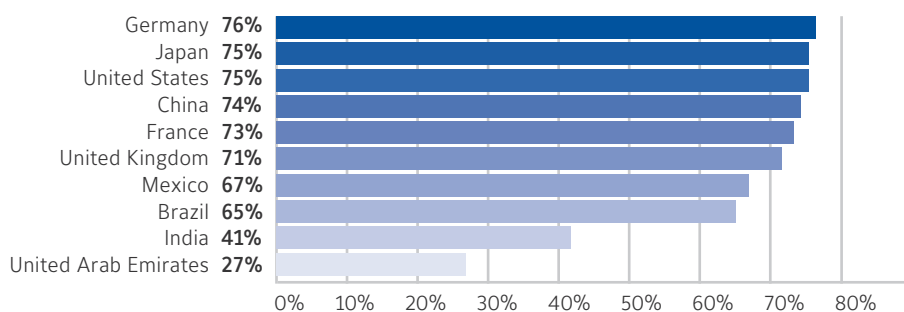


Johnson Controls conducts an annual Energy Efficiency Indicator survey tracking current and planned investments, key drivers, and organizational barriers to improving energy efficiency in facilities.

Since the first survey was released in 2007, almost 27,000 energy and facility management leaders have been surveyed. This year marks the 13th edition of the survey with over 1,300 respondents represented from eleven countries, including Brazil, China, France, Germany, India, Ireland, Japan, Mexico, United Arab Emirates, United Kingdom, and the United States.

Investment in energy efficiency and smart building technology

Organizations planning to increase investment in energy efficiency, renewable energy and smart building technology over the next 12 months



Energy cost savings is the top driver of investment globally

Organizations rating as very or extremely important driver in building energy and technology investment decisions

Energy cost savings	79%
Greenhouse gas footprint reduction	73%
Improving life safety and security	72%
Improving operational efficiency	72%
Increasing energy security	70%
Enhanced brand or reputation	70%
Attracting and retaining employees	68%

Top barriers to investment

Asia

- 31%** Lack of funding to pay for improvements
- 18%** Uncertainty regarding savings/performance
- 18%** Lack of technical expertise to evaluate or execute projects

Europe & Middle East

- 29%** Lack of funding to pay for improvements
- 25%** Uncertainty regarding savings/performance
- 18%** Insufficient payback/ROI

Americas

- 26%** Lack of funding to pay for improvements
- 23%** Uncertainty regarding savings/performance
- 18%** Insufficient payback/ROI

Top energy efficiency measures for past 12 months

Percentage of global respondents that invested in the past 12 months

Building controls improvements	70%
Energy focused behavioral or educational programs	70%
Heating, ventilation, and air conditioning improvements	67%
Integration of security systems with other building technology systems	64%
Onsite renewable energy	57%
Integration of fire/life safety with other building technology systems	56%
Centralized building operations center	55%
Building systems integration	51%

Investment in systems integration

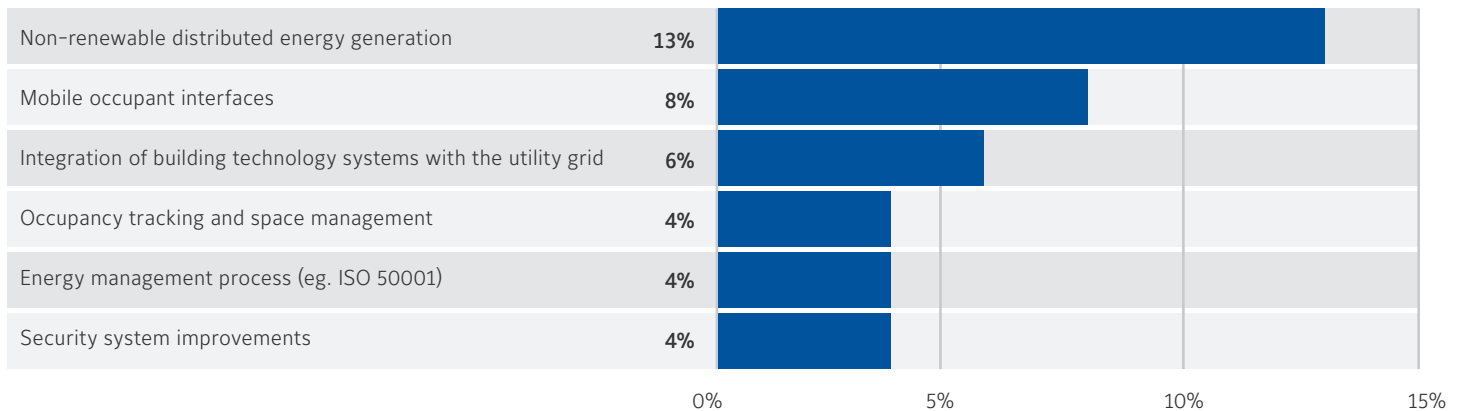
Planned investment in the next 12 months	
Fire/life safety integration	45%
Building management systems integration	40%
Security system integration	40%
Distributed energy resources integration	30%
Lighting systems integration	29%
Smart Building equipment integration	29%
Integration with the utility grid	28%














Policies driving energy efficient improvements in buildings

Organizations rating as very or extremely important	
Performance benchmarking	89%
Building energy codes and product standards	73%
Building owner and occupant partnerships	73%
Financial incentives	71%
Building efficiency targets	65%
Government leadership	60%
Utility data access, rates, incentives, and programs	60%
Private sector engagement	57%

Smart building measures, including mobile occupant interfaces, integration with the utility grid, and occupancy tracking, are predicted to increase in the next year

Percentage of US respondents planning to invest in the next 12 months minus the percentage investing in the past 12 months



	Asia	Europe & Middle East	Americas
Green building certification Already achieved or plan to achieve voluntary green building certification	2019 72%  2018 54%	2019 76%  2018 63%	2019 82%  2018 54%
Green building tenant space Willing to pay a premium to lease space in a certified green building	2019 54%  2018 54%	2019 52%  2018 54%	2019 53%  2018 47%
Net zero energy/ carbon Extremely or very likely to have one or more facilities that are nearly zero, net zero or positive energy or carbon status in the next ten years	2019 50%  2018 46%	2019 54%  2018 51%	2019 55%  2018 49%
Operate off the grid Extremely or very likely to have a facility that will operate off the grid in the next ten years	2019 55%  2018 48%	2019 58%  2018 51%	2019 52%  2018 50%
Resilience Indicated that it is an extremely or very important factor when considering future energy and building infrastructure investments.	2019 81%  2018 69%	2019 81%  2018 74%	2019 84%  2018 71%

*Asia includes China, Japan, and India; Europe and Middle East includes the United Kingdom, Ireland, France, Germany, United Arab Emirates; Americas include Brazil, Mexico, and the United States

2019 Global Survey Demographics

To qualify, respondents must have facility budget responsibility and propose or approve energy efficiency initiatives for their organization. The survey was administered anonymously by a third party research partner. For the 2019 global survey, there was a representative mix of respondents from institutional, commercial, and industrial organizations. In addition, there was a range of organizational titles, including C-level executives, vice presidents, directors and managers.

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