2019 Energy Efficiency Indicator Survey

Mexico Results

The thirteenth edition of the Energy Efficiency Indicator Study surveyed 100 energy and facility management executives across Mexico.

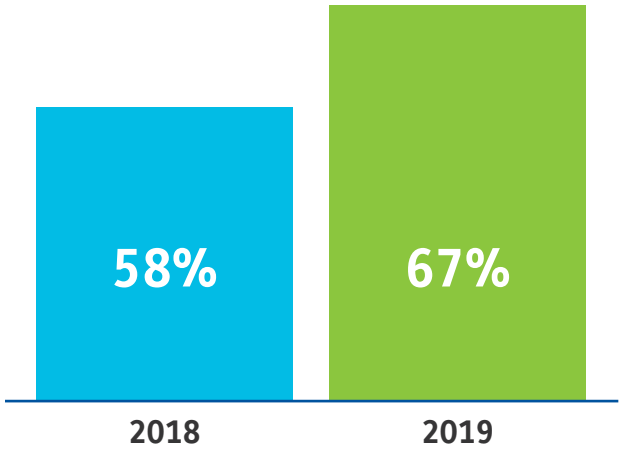
Survey respondents meet one of at least the following criteria:

- They review or monitor the amount of energy used by organization's facilities
- They propose or approve energy efficiency or smart building initiatives
- They have budget management or investment responsibility for organization's facilities

Survey respondents			
Commercial	**29%**	C-Level	**9%**
Institutional	**22%**	Vice President/Director	**34%**
Industrial	**31%**	Manager	**57%**
Other	**18%**	Other	**0%**

Investment in energy efficiency, renewable energy and smart building technology is expected to increase significantly next year

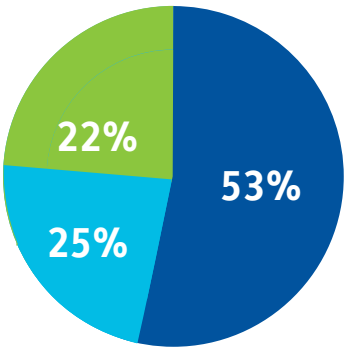
Percentage of organizations that will increase investment in energy efficiency, renewable energy or smart building technology over the next 12 months



Energy cost savings, energy security and operational efficiency are the biggest drivers of investment

Rated as 'extremely or very significant' by organizations	
Energy cost savings	81%
Increasing energy security	76%
Improving operational efficiency	76%
Greenhouse gas footprint reduction	75%
Enhanced brand or reputation	75%
Improving life safety and security	74%
Increasing resilience to weather and energy system disruptions	69%

Organizations that have goals for energy and/or carbon reduction are more than twice as likely to increase investment next year



Percentage of organizations with goals for energy and/or carbon reduction

- Public Goals
- No Goals
- Internal Goals

Percentage of organizations that will increase investment in energy efficiency, renewable energy or smart building technology over next 12 months

36% No goal for energy or carbon reduction

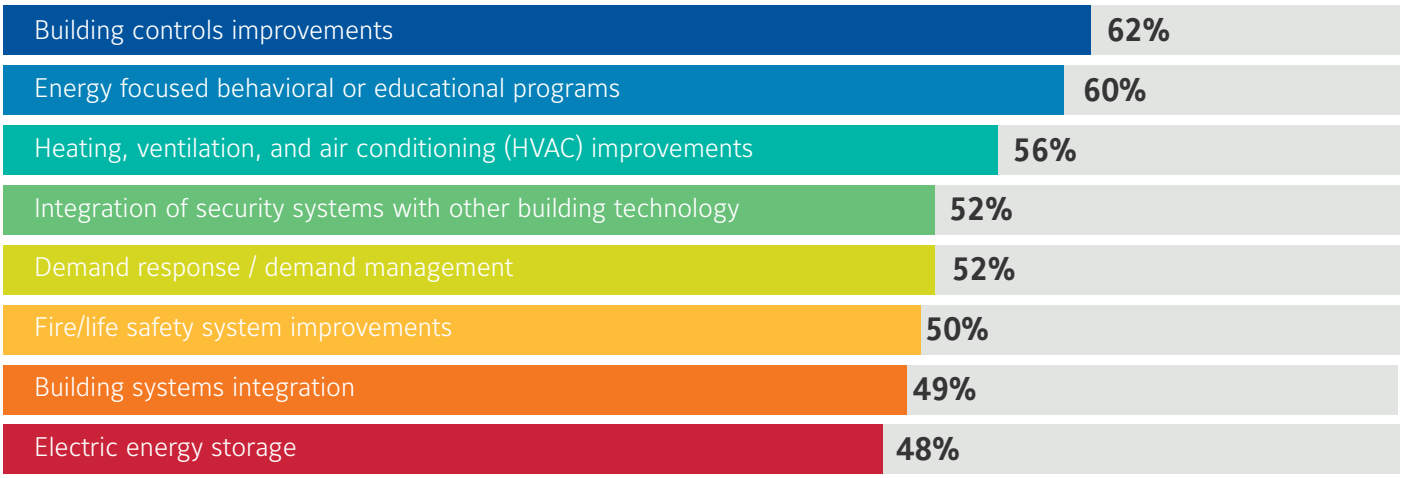
77% Internal or public goal for energy or carbon reduction

Technology trends expected to have the largest impact on smart building investments over the next 5 years.

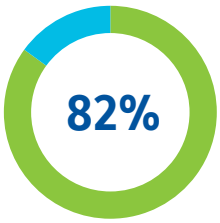
Rated as 'extremely significant' by organizations	
Data analytics / Machine learning	38%
Cybersecurity	32%
Internet of Things	32%
Systems integration	30%
Advanced sensing	26%

Building controls, energy-focused education programs, and HVAC are expected to be the biggest investments in the next year

Top 8 building/energy investments organizations plan in the next 12 months



Interest in achieving green building certification and leasing space in green buildings

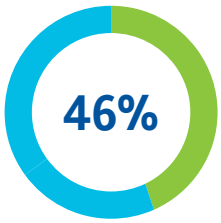


Green building certification

Respondents that have achieved or plan to achieve voluntary green building certification

Increase from 2018 of 32%

21% have achieved
61% plan to achieve

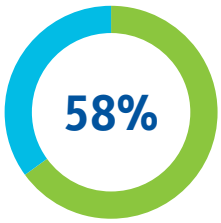


Leased Space in Green Buildings

Respondents that are willing to pay a premium for space in a certified green building

Increase from 2018 of 1%

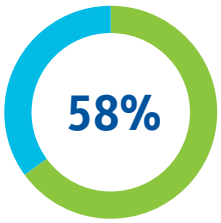
The trend towards decarbonization is increasing interest in net zero carbon buildings as well as on-site renewable energy



Net zero energy / carbon facility

Respondents that are very or extremely likely to have one or more facilities that are nearly zero or net zero energy or carbon, or which will achieve positive carbon or positive energy status, in the next ten years

Increase from 2018 of 10%

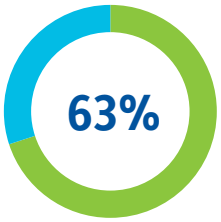


Investment in on-site renewable energy

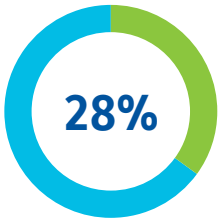
Respondents that invested in on-site renewable energy last year

Increase from 2018 of 6%

Minimizing use of fossil fuels is an important investment driver

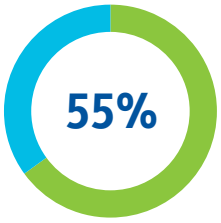


Minimizing use of fossil fuels
Respondents that indicated that minimizing the use of fossil fuel in space and water heating is very or extremely important



Heat pump replacement of fossil fuel heating
Respondents that invested in replacing fossil fuel space / water heating with heat pump technology last year

Resilience and independence from the grid are increasingly important drivers in future building infrastructure investments



Going off the grid
Respondents that are very or extremely likely to have one or more facilities able to operate off the grid in the next ten years

Increase from 2018 of 8%

81% of respondents indicated **resilience** is very or extremely important when considering infrastructure investments, up 24% from last year

Security, fire/life safety and lighting systems received the most systems integration investment last year

Organizations investing in the past 12 months

Security systems integration	72%
Fire / life safety integration	56%
Lighting systems integration	48%
Building management systems integration	35%
Smart building equipment integration	35%
Distributed energy resource integration	34%
Energy information management software	23%

© 2020 Johnson Controls. All rights reserved.

The power behind **your mission**

Johnson Controls