

2019 Energy Efficiency Indicator Survey

U.S. Results



The thirteenth edition of the Energy Efficiency Indicator Study surveyed 400 energy and facility management executives across the U.S.

Survey respondents meet one of at least the following criteria:

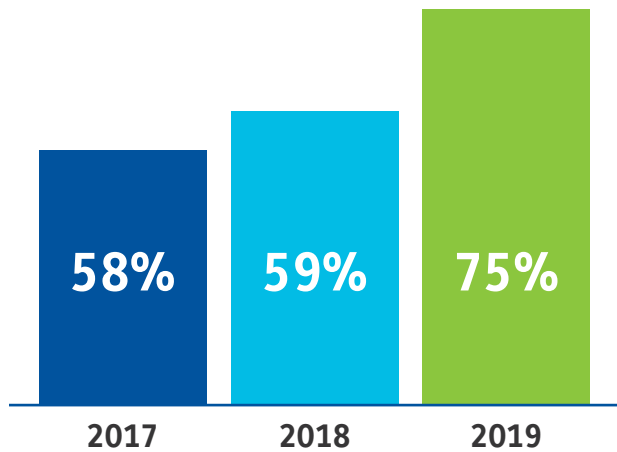
- They review or monitor the amount of energy used by organization’s facilities
- They propose or approve energy efficiency or smart building initiatives
- They have budget management or investment responsibility for organization’s facilities

Survey respondents			
Commercial	37%	C-Level	21%
Institutional	25%	Vice President/Director	31%
Industrial	25%	Manager	46%
Other	13%	Other	2%



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

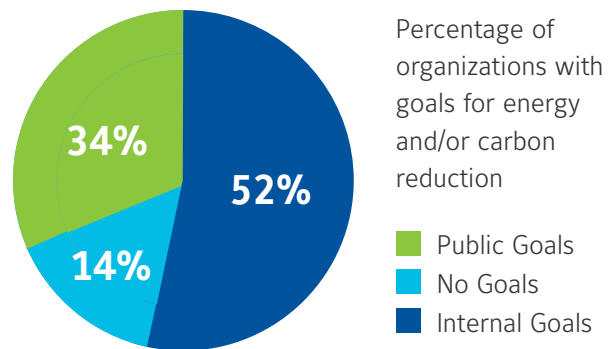
Percentage of organizations that will increase investment in energy efficiency, renewable energy or smart building technology over the next 12 months



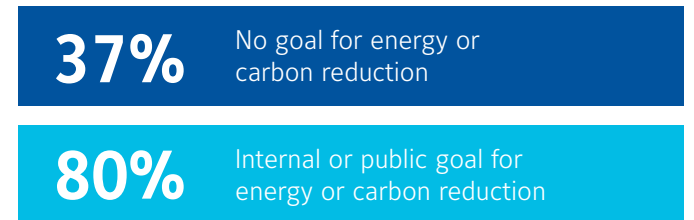
Energy cost savings, energy security and carbon reductions are the biggest drivers of investment

Rated as 'extremely significant' by organizations	
Energy cost savings	54%
Increasing energy security	52%
Greenhouse gas footprint reduction	51%
Increasing building resilience	45%
Improving life safety and security	42%
Supporting organization's mission	42%
Improving operational efficiency	41%

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



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

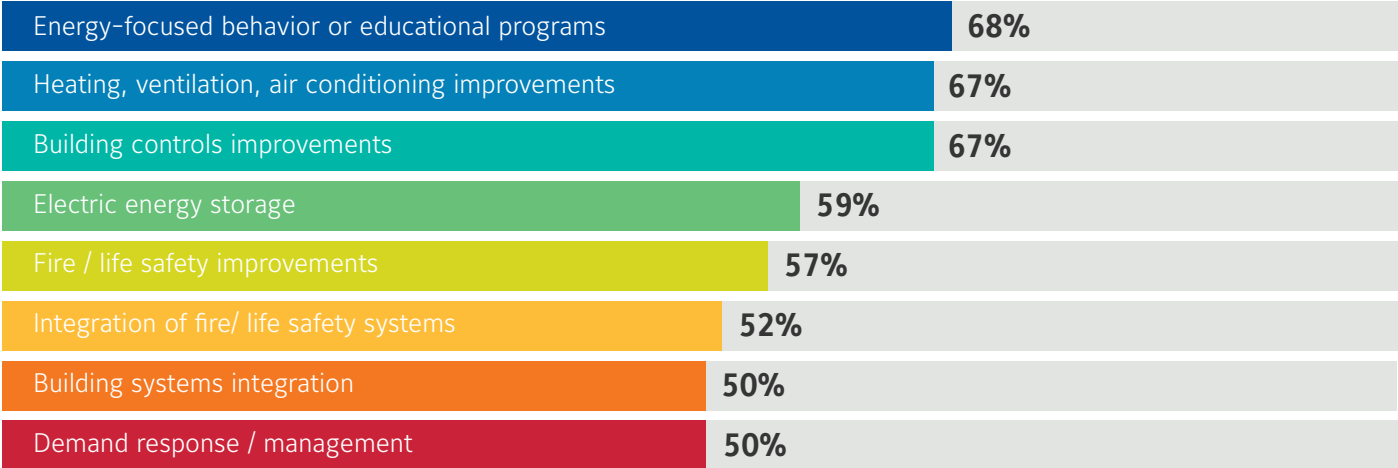


IoT, cybersecurity, and data analytics / machine learning are expected to have the greatest impact on smart building investments over the next five years

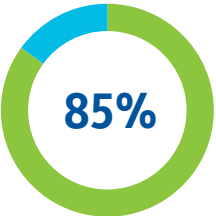
Rated as 'extremely significant' by organizations	
Internet of Things	47%
Cybersecurity	46%
Data analytics / machine learning	45%
Data privacy	30%
Advanced controls	28%

Energy-focused educational programs, HVAC, and building controls are expected to be the biggest investments in the next year

Organizations investing in the next 12 months



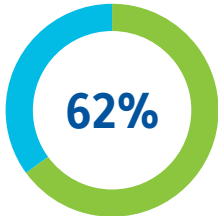
Interest in achieving green building certification and leasing space in green buildings is increasing



Green building certification
U.S. respondents that have achieved or plan to achieve voluntary green building certification

Increase of 13% on last year

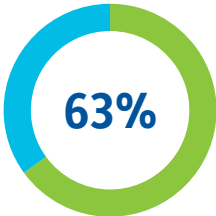
25% have achieved
60% plan to achieve



Leased Space in Green Buildings
U.S. respondents that are willing to pay a premium for space in a certified green building

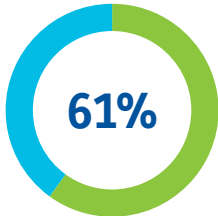
Increase of 18% on last year

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



Net zero energy / carbon
U.S. respondents that are very or extremely likely to have one or more facilities that are nearly zero or net zero carbon, or which will achieve positive carbon or positive energy status, in the next ten years

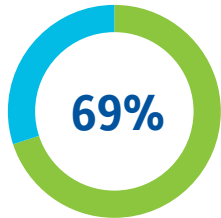
Increase of 2% on last year



Investment in on-site renewable energy
U.S. respondents that invested in on-site renewable energy last year

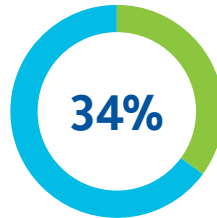
Increase of 11% on last year

Minimizing use of fossil fuels is an important investment driver



Minimizing use of fossil fuels

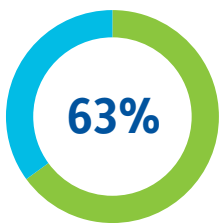
U.S. respondents that indicated that minimizing the use of fossil fuel in space and water heating is very or extremely important



Heat pump replacement of fossil fuel heating

U.S. 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

U.S. 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 of 9% on last year

87% of U.S. respondents indicated **resilience** is very or extremely important when considering infrastructure investments, up almost 20% 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	83%
Fire / life safety integration	70%
Lighting systems integration	54%
Building management systems integration	49%
Smart building equipment integration	39%
Energy information management software	35%
Distributed energy resource integration	29%

There was a significant year-over-year increase in distributed energy resource investments

Change in percentage of organizations planning to invest in 2020 compared to 2019

Non-renewable distributed energy generation	+18%
Electric energy storage	+9%
Integration with distributed energy resources	+4%
Thermal storage	+4%

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