

# 2017 Energy Efficiency Indicator Survey: US & CANADA 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 24,000 energy and facility management leaders have been surveyed.

INTEREST AND INVESTMENT

IN ENERGY EFFICIENCY

TO GROW IN THE US

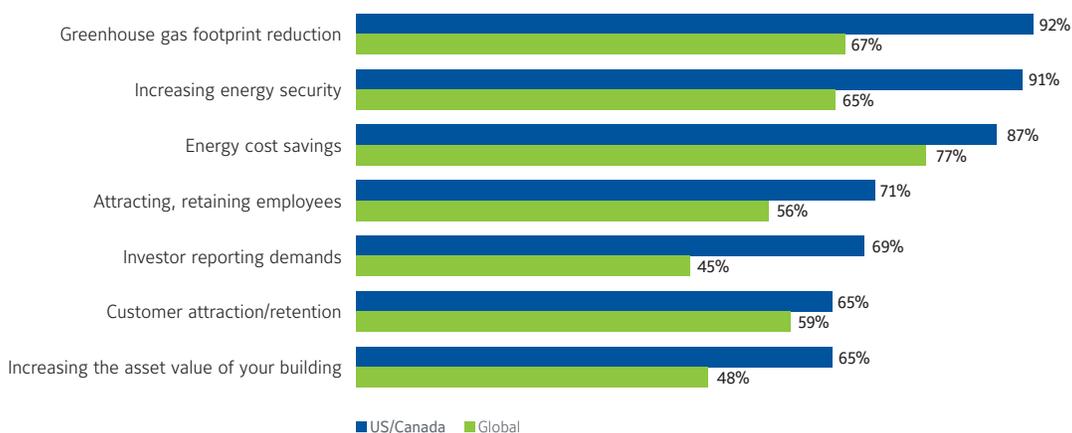
AND CANADA

## Highlights from the 2017 US & Canada Survey:

- Energy efficiency is increasing in importance and investment remains high. 71% of organizations are paying more attention to energy efficiency than they were one year ago, which is translating into investment. 43% of organizations plan to increase energy efficiency and renewable energy investments in the next year, with an additional 52% planning to keep their investment level the same.
- For the first time in the survey's history, greenhouse gas reduction and increased energy security surpassed energy cost savings as the most important drivers in energy investment decisions for the US and Canada. 92% of organizations rated greenhouse gas footprint reduction as very or extremely important in driving investment decisions and 91% rated increasing energy security as very or extremely important. Energy cost savings followed closely behind with 87% of respondents rating it as very or extremely important in their decision making.

### Drivers of energy efficiency investments:

Organizations rating as very or extremely significant



- The top energy efficiency measures adopted over the past twelve months include heating, ventilation and air-conditioning (73%), energy focused behavioral programs (66%), building controls improvements (63%), and onsite renewable energy (60%).
- When asked about planned investment over the next twelve months, onsite-renewable led the way with 60% of respondents indicating they would invest. It was followed by energy focused behavioral programs (52%), heating, ventilation, and air conditioning improvements (51%), and building systems integration (48%).

THIS YEAR  
MARKS THE  
11TH YEAR  
of the survey  
with over  
**1,500**  
respondents  
represented from  
**twelve**  
countries,  
including almost  
**140**  
leaders  
from the  
United States  
and Canada.

## Highlights from the 2017 US & Canada Survey:

- For almost one-third of respondents, the top barrier to pursuing energy efficiency in the US and Canada is insufficient payback / return on investment. Other common barriers include lack of technical expertise to evaluate or execute projects (22%), uncertainty regarding savings/performance (21%), and lack of funding to pay for improvements (21%).
- Even with demand for green buildings increasing, more organizations plan to have net zero energy buildings than certified green buildings in the future. 41% of organizations already have or plan to have at least one certified green building in the future and 41% of organizations are willing to pay a premium for space in a certified green building. Slightly more organizations plan to achieve near zero, net zero or energy positive status for at least one building in the next 10 years, with 47% indicating it is very or extremely likely.
- Resiliency is an increasingly important consideration for building infrastructure investments. 73% of organizations stated that maintaining critical operations during severe weather events or extended power outages is very or extremely important when considering future infrastructure investments. In addition, 44% of organizations are very or extremely likely to have one or more facilities able to operate off the grid in the next 10 years.
- Building systems integration continues to build momentum as the focus on smart buildings increases. 39% of organizations invested in systems integration in the past 12 months and 48% plan to invest in the next 12 months. Life safety is leading the way with 72% of respondents indicating it has already been integrated with other building technologies. This is followed by energy management and security, with 55% of respondents indicating they have been integrated with other building technology systems.
- In the US and Canada, financial incentives and programs are seen as the most effective policy driving energy efficiency improvements with 94% of respondents ranking it as very or extremely important. Other policies that are effective in driving energy efficiency improvement include performance benchmarking and certifications (92% of organizations rated as very or extremely important), public and private sector building efficiency targets (89% of organizations rated as very or extremely important), and government leadership in leasing, building design, and retrofits (84% of organizations rated as very or extremely important).

### Policies driving energy efficiency improvements: Organizations rating as very or extremely important



## 2017 US & CANADA 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 partner. For the 2017 US and Canada survey, there was a good mix of respondents from institutional, commercial, and industrial organizations, as well as a mix of organizational titles, including c-level executives, vice presidents, directors and managers. 37% of respondents have responsibility for facilities that cover more than 500,000 square feet, 49% cover 50,000 to 500,000 square feet, and 14% cover less than 50,000 square feet.

For more information go to [www.johnsoncontrols.com/insights/2018/buildings/features/energy-efficiency-indicator-survey](http://www.johnsoncontrols.com/insights/2018/buildings/features/energy-efficiency-indicator-survey)