Highlights from the 2017 Brazil Survey:

- Energy efficiency is increasing in importance and investment remains high. 42% 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 41% planning to keep their investment level the same.

- Energy cost savings is the most important driver in energy investment decisions in Brazil. 78% of organizations rated energy cost savings as very or extremely important in driving investment decisions. Other important drivers included greenhouse gas reduction (77% of respondents rating it as very or extremely important) and increasing energy security (64% of respondents rating it as very or extremely important).

Drivers of energy efficiency investments:
Organizations rating as very or extremely significant

- Energy cost savings: 78%
- Greenhouse gas footprint reduction: 77%
- Increasing energy security: 64%
- Customer attraction/retention: 55%
- Attracting, retaining employees: 54%
- Enhanced brand or public image: 45%
- Existing government policy: 33%
- Government/utility incentives/rebates: 30%

- The top energy efficiency measures adopted over the past twelve months include heating, ventilation, and air conditioning improvements (84%), building controls improvements (58%), energy focused behavioral or educational programs (58%), and thermal energy storage (55%).

- When asked about planned investment over the next twelve months, thermal energy storage led the way with 57% of respondents indicating they would invest. It was followed by heating, ventilation, and air conditioning improvements (53%), building controls improvements (49%), and onsite renewable energy (48%).
Highlights from the 2017 Brazil Survey:

- For 43% of respondents, the top barrier to pursuing energy efficiency is lack of funding to pay for improvements. Other common barriers include lack of technical expertise to evaluate or execute projects (20%), and uncertainty regarding savings/performance (17%).

- Even with demand for green buildings increasing, more organizations plan to have net zero energy buildings than certified green buildings in the future. 49% 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. More organizations plan to achieve near zero, net zero or energy positive status for at least one building in the next 10 years, with 56% indicating it is very or extremely likely.

- Resiliency is an increasingly important consideration for building infrastructure investments. 56% 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, 14% 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. 55% of organizations invested in systems integration in the past 12 months and 36% plan to invest in the next 12 months. Security systems are leading the way with 43% of respondents indicating they have already been integrated with other building technology systems. This is followed by energy management systems (integrated with other building technology systems for 36% of respondents) and life safety systems (integrated with other building technology systems for 32% of respondents).

- In Brazil, performance benchmarking and certification is the most effective policy driving energy efficiency improvements with 80% of respondents ranking it as very or extremely important. Other policies that are effective in driving energy efficiency improvement are financial incentives and programs (72% of organizations rated as very or extremely important), building energy codes and product standards (64% of organizations rated as very or extremely important), and government leadership in leasing, building design, and retrofits (60% of organizations rated as very or extremely important).

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

- Performance benchmarking and certifications: 80% Brazil, 83% Global
- Financial incentives and programs: 72% Brazil, 73% Global
- Building energy codes and product standards: 64% Brazil, 64% Global
- Government leadership in leasing, building design, and retrofits: 60% Brazil, 81% Global
- Public and private sector building efficiency targets: 55% Brazil, 79% Global
- Utility data access, tariffs, incentives, and programs: 38% Brazil, 53% Global
- Private sector engagement in workforce development, performance contracting, and financing: 34% Brazil, 49% Global
- Building owner and occupant engagement and partnerships: 24% Brazil, 52% Global

For more information go to www.johnsoncontrols.com/insights/2018/buildings/features/energy-efficiency-indicator-survey

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