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.

### Highlights from the 2017 France Survey:

- **Energy efficiency is increasing in importance and investment remains high.** 70% of organizations are paying more attention to energy efficiency than they were one year ago, which is translating into investment. 69% of organizations plan to increase energy efficiency and renewable energy investments in the next year, with an additional 24% planning to keep their investment level the same.

- **Energy cost savings was the most important driver in energy investment decisions in France.** 75% of organizations rated energy cost savings as very or extremely important in driving investment decisions. Other important drivers included greenhouse gas footprint reduction (71% of respondents rating it as very or extremely important), increasing energy security (70% of respondents rating it as very or extremely important), and increasing building resilience to weather and energy system disruptions (70% of respondents rating it as very or extremely important).

### Drivers of energy efficiency investments:

**Organizations rating as very or extremely significant**

<table>
<thead>
<tr>
<th>Category</th>
<th>France</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy cost savings</td>
<td>75%</td>
<td>77%</td>
</tr>
<tr>
<td>Greenhouse gas footprint reduction</td>
<td>71%</td>
<td>67%</td>
</tr>
<tr>
<td>Increasing energy security</td>
<td>65%</td>
<td>70%</td>
</tr>
<tr>
<td>Increase building resilience to weather and energy system disruptions</td>
<td>52%</td>
<td>70%</td>
</tr>
<tr>
<td>Enhanced brand or public image</td>
<td>55%</td>
<td>65%</td>
</tr>
<tr>
<td>Government/utility incentives/rebates</td>
<td>56%</td>
<td>50%</td>
</tr>
<tr>
<td>Customer attraction/retention</td>
<td>54%</td>
<td>59%</td>
</tr>
<tr>
<td>Existing government policy</td>
<td>44%</td>
<td>52%</td>
</tr>
</tbody>
</table>

- **The top energy efficiency measures adopted over the past twelve months include energy focused behavioral or educational programs (80%), heating, ventilation, and air conditioning improvements (77%), onsite renewable energy (70%), and building controls improvements (63%).**

- **When asked about planned investment over the next twelve months, thermal energy storage led the way with 56% of respondents indicating they would invest.** It was followed by energy focused behavioral programs (52%), electric energy storage (52%), and building controls improvements (50%).
For 28% of respondents, the top barrier to pursuing energy efficiency is lack of funding to pay for improvements. Other common barriers include insufficient payback / return-on-investment (27%) and lack of technical expertise to evaluate or execute projects (19%).

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 46% 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 70% indicating it is very or extremely likely.

Resiliency is an increasingly important consideration for building infrastructure investments. 79% 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, 78% 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. 49% of organizations invested in systems integration in the past 12 months and 46% plan to invest in the next 12 months. Energy management is leading the way with 54% of respondents indicating it has already been integrated with other building technology systems. This is followed by lighting (integrated with other building technology systems for 53% of respondents) and life safety systems (integrated with other building technology systems for 51% of respondents).

In France, performance benchmarking and certification is seen as the most effective policy driving energy efficiency improvements with 92% of respondents ranking it as very or extremely important. Other policies that are effective in driving energy efficiency improvement include government leadership in leasing, building design, and retrofits (89% of organizations rated as very or extremely important), public and private sector building efficiency targets (85% of organizations rated as very or extremely important), and financial incentives and programs (68% of organizations rated as very or extremely important).

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

- Performance benchmarking and certifications: 92% (France), 83% (Global)
- Government leadership in leasing, building design, and retrofits: 89% (France), 81% (Global)
- Public and private sector building efficiency targets: 85% (France), 79% (Global)
- Financial incentives and programs: 68% (France), 73% (Global)
- Building energy codes and product standards: 61% (France), 64% (Global)
- Building owner and occupant engagement and partnerships: 47% (France), 52% (Global)
- Utility data access, tariffs, incentives, and programs: 42% (France), 53% (Global)
- Private sector engagement in workforce development, performance contracting, and financing: 34% (France), 49% (Global)

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