2017 Energy Efficiency Indicator Survey:
MEXICO 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.

Highlights from the 2017 Mexico Survey:

- Energy efficiency is increasing in importance and investment remains high. 62% of organizations are paying more attention to energy efficiency than they were one year ago, which is translating into investment. 40% of organizations plan to increase energy efficiency and renewable energy investments in the next year, with an additional 56% planning to keep their investment level the same.

- Energy cost savings was the most important driver in energy investment decisions in Mexico. 61% of organizations rated energy cost savings as very or extremely important in driving investment decisions. Other important drivers included increasing energy security (56% of respondents rating it as very or extremely important), existing government policy (54% of respondents rating it as very or extremely important), and attracting and retaining employees (53% of respondents rating it as very or extremely important).

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

- Energy cost savings: 61% Mexico, 77% Global
- Increasing energy security: 56% Mexico, 65% Global
- Existing government policy: 54% Mexico, 52% Global
- Attracting, retaining employees: 53% Mexico, 56% Global
- Increase building resilience to weather and energy system disruptions: 51% Mexico, 52% Global
- Greenhouse gas footprint reduction: 49% Mexico, 67% Global
- Increasing the asset value of your building: 49% Mexico, 48% Global
- Enhanced brand or public image: 48% Mexico, 55% Global

- The top energy efficiency measures adopted over the past twelve months include heating, ventilation, and air conditioning and building controls improvements (53%), onsite renewable energy (51%), energy focused behavioral or educational programs (44%), and building systems integration (44%).

- When asked about planned investment over the next twelve months, onsite renewable energy led the way with 60% of respondents indicating they would invest. It was followed by building controls improvements (56%), heating, ventilation, and air conditioning improvements (51%), and thermal energy storage (51%).
For 45% of respondents, the top barrier to pursuing energy efficiency is lack of funding to pay for improvements. Another common barrier is lack of technical expertise to evaluate or execute projects (36%).

As the demand for green buildings increases, the demand for net zero energy buildings is also on the rise. 43% of organizations already have or plan to have at least one certified green building in the future and 71% of organizations are willing to pay a premium for space in a certified green building. Many organizations plan to achieve near zero, net zero or energy positive status for at least one building in the next 10 years, with 39% indicating it is very or extremely likely.

Resiliency is an increasingly important consideration for building infrastructure investments. 54% 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, 56% 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. 44% of organizations invested in systems integration in the past 12 months and 41% plan to invest in the next 12 months. Energy management, life safety, and security are leading the way with 39% of respondents indicating they have already been integrated with other building technology systems. This is followed by lighting systems (integrated with other building technology systems for 35% of respondents) and business systems (integrated with other building technology systems for 31% of respondents).

In Mexico, performance benchmarking and certifications are the most effective policy driving energy efficiency improvements with 79% of respondents ranking it as very or extremely important. Other policies that are effective in driving energy efficiency improvement are government leadership in leasing, building design, and retrofits (75% of organizations rated as very or extremely important) and public and private sector building efficiency targets (74% of organizations rated as very or extremely important).

### Policies driving energy efficiency improvements:

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<thead>
<tr>
<th>Policy</th>
<th>Mexico</th>
<th>Global</th>
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<tbody>
<tr>
<td>Performance benchmarking and certifications</td>
<td>79%</td>
<td>83%</td>
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<tr>
<td>Government leadership in leasing, building design, and retrofits</td>
<td>75%</td>
<td>81%</td>
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<tr>
<td>Public and private sector building efficiency targets</td>
<td>24%</td>
<td>79%</td>
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<tr>
<td>Utility data access, tariffs, incentives, and programs</td>
<td>60%</td>
<td>79%</td>
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<tr>
<td>Financial incentives and programs</td>
<td>53%</td>
<td>73%</td>
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<tr>
<td>Building energy codes and product standards</td>
<td>59%</td>
<td>73%</td>
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<tr>
<td>Building owner and occupant engagement and partnerships</td>
<td>54%</td>
<td>52%</td>
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<tr>
<td>Private sector engagement in workforce development, performance contracting, and financing</td>
<td>39%</td>
<td>49%</td>
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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 Mexico 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. 32% of respondents have responsibility for facilities that cover more than 500,000 square feet, 50% cover 50,000 to 500,000 square feet, and 18% cover less than 50,000 square feet.

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