2018 Energy Efficiency Indicator Survey | United States

Johnson Controls

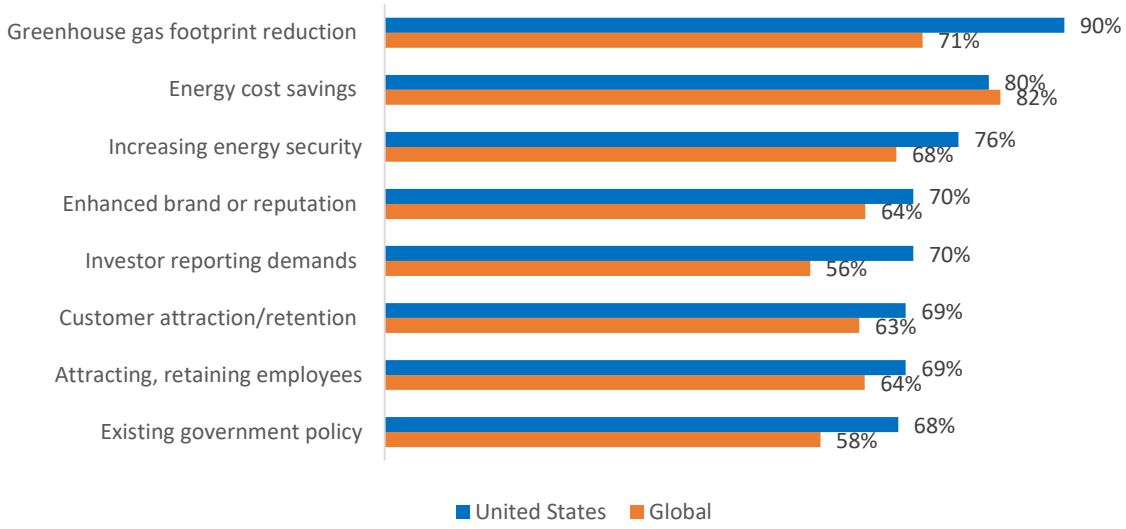
Johnson Controls conducts an annual Energy Efficiency Indicator survey tracking current and planned investments, key drivers, and organizational barriers to improving energy efficiency in facilities. Since the first survey was released in 2007, almost 26,000 energy and facility management leaders have been surveyed. This year marks the 12th edition of the survey with over 1,900 respondents represented from twenty countries, including 100 leaders from the United States.

INTEREST AND INVESTMENT IN ENERGY EFFICIENCY AND SMART BUILDING TECHNOLOGY

UNITED STATES	GLOBAL
77% of organizations are paying more attention 57% of organizations plan to increase energy efficiency and renewable energy investments 39% plan to keep their investment level the same	Globally, 59% of organizations plan to increase investment, up slightly from 58% last year

DRIVERS IN ENERGY INVESTMENT DECISIONS

Organizations rating as very or extremely important



TOP BARRIERS TO INVESTMENT

UNITED STATES	GLOBAL
30% Insufficient payback or return-on-investment **24%** Uncertainty regarding savings and performance **22%** Lack of funding to pay for improvements	**28%** Lack of technical expertise to evaluate or execute projects **22%** Lack of funding to pay for improvements **18%** Uncertainty regarding savings and performance

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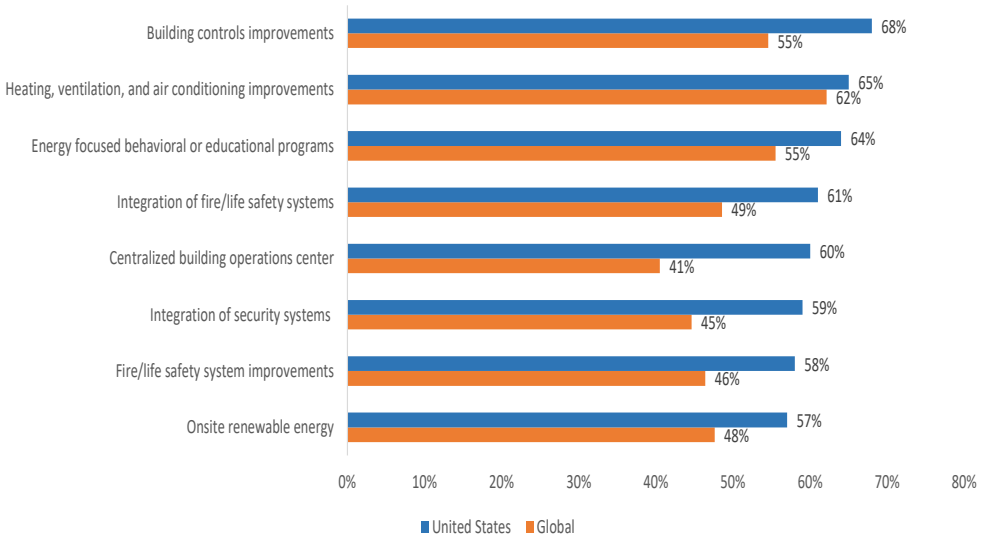
TOP ENERGY EFFICIENCY MEASURES

PAST 12 MONTHS

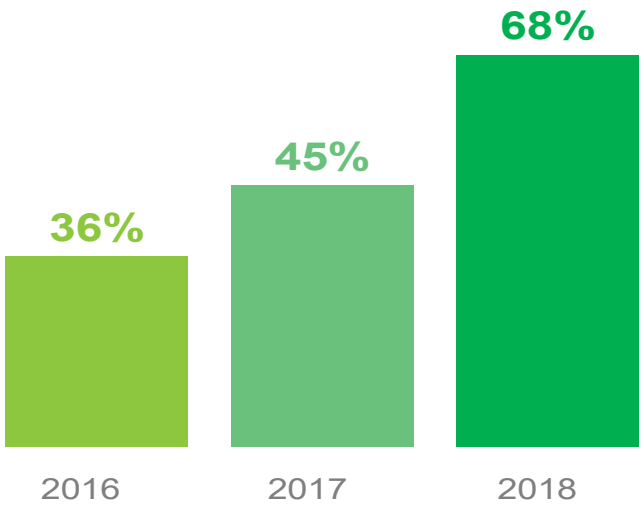
1. Energy focused behavioral programs
2. Heating, ventilation and air-conditioning improvements
3. Building controls improvements
4. Lighting improvements
5. Integration of fire/life safety systems
6. Integration of security systems
7. Centralized building operations centers
8. Onsite renewable energy

NEXT 12 MONTHS

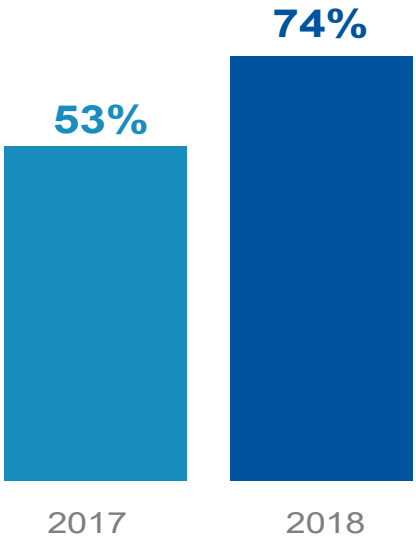


- The percentage of organizations investing in building controls in the US has steadily increased since 2016 with the actual exceeding predictions for the past two years.

US Respondents that Plan to Invest in Building Controls in the Next 12 Months



US Respondents that Invested in Building Controls in the Past 12 Months



- In the United States, **cybersecurity, systems integration**, and **data visualization** were identified as the technologies that will have the biggest impact on the implementation of smart buildings over the next five years. Globally, the top technology trends were identified as cybersecurity, systems integration, and the Internet of Things.

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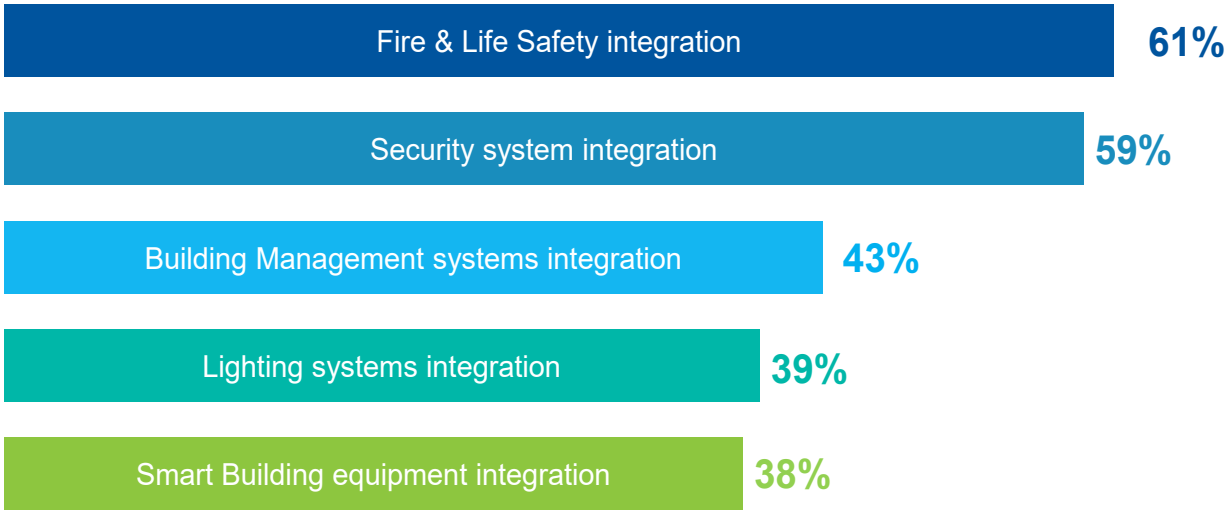
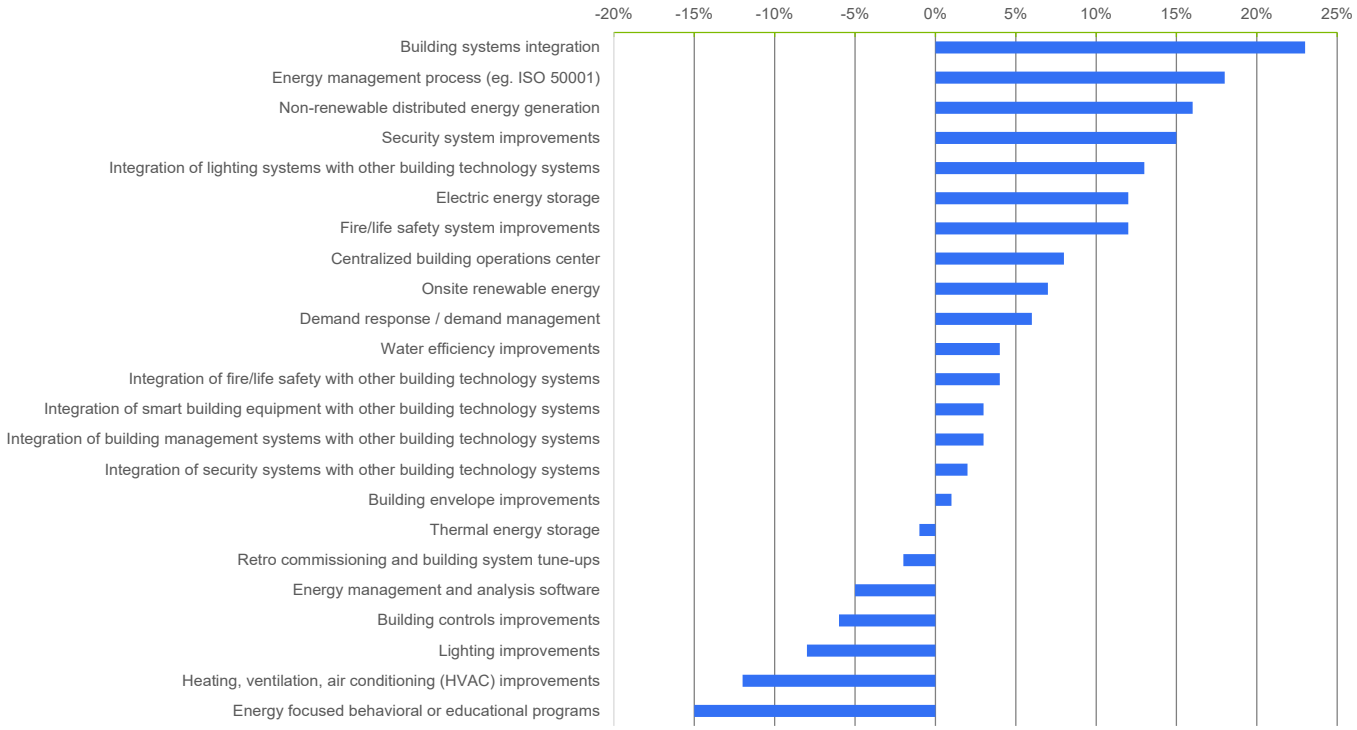
- The trend towards building systems integration will continue with strong investment planned in the next year

US organizations investing in the next 12 months



- Smart building measures, including building systems integration along with energy management processes, distributed generation and energy storage show the greatest increase between planned and previous year investments

Percentage of US respondents planning to invest in the next 12 months minus the percentage investing in the past 12 months



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For more information on the study, please visit **www.johnsoncontrols.com**

	UNITED STATES		GLOBAL
GREEN BUILDING CERTIFICATION	19% from 8% in 2008	Already achieved voluntary green building certification	14%
	53% from 34% in 2008	Plan to in the future	44%
GREEN BUILDING TENANT SPACE	44%	Willing to pay a premium to lease space in a certified green building	51%
NET ZERO ENERGY/ CARBON	61% 14% y-o-y	Indicated that it is an extremely or very important factor when considering future energy and building infrastructure investments.	50%
OPERATE OFF THE GRID	54%	Extremely or very likely to have a facility that will operate off the grid in the next ten years	50%
RESILIENCE	68%	Indicated that it is an extremely or very important factor when considering future energy and building infrastructure investments.	72%

2018 United States 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 2018 U.S. survey, there was a representative mix of respondents from institutional, commercial, and industrial organizations. In addition, there was a range of organizational titles, including C-level executives, vice presidents, directors and managers.

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